CMS Attendance for Windows

By Church Management Solutions

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Introduction to CMS Attendance for Windows

Overview

Welcome to *CMS Attendance for Windows*, another fine product from *Church Management Solutions*. You will find this software flexible and full of solutions for your every day church administration needs. Its Windows™ interface makes this software especially easy-to-learn and easy-to-operate.

Some of the features of *CMS Attendance for Windows* are:

- can be interfaced with *CMS Membership for Windows* and/or *CMS Contributions for Windows*

- maintains attendance groups for worship services, and/or other activities such as Sunday School or Bible Study groups

- maintains for each person:

  name, address, and telephone number

  attendance records for each attendance group

- standard reports including Attendance Detail, Attendance Pattern, Consecutive Absences, First Time Attendees, Group Reports such as Group Attendance Summary and Group Head Counts and Summary Graphs

With CMS you will find that entering and posting attendance, whether for the first time, or as a maintenance task, is done quickly and with a minimum of training and practice. Your reports are more comprehensive and detailed than ever with the customizing power of the optional *Crystal Reports* report generator.

To fully utilize the capabilities of *CMS Attendance for Windows* you should be familiar with basic Windows™ functions such as windows, menus, dialogs, and the mouse. If you are not familiar with these, please refer to your *"Microsoft Windows User's Guide."*

How to Use the Manual

Your *CMS Attendance for Windows User's Guide* has been designed to help you take full advantage of the features and versatility of the software. Within each category of information, are detailed explanations of features and their intended functions (outcomes) as applied to the practice of sound church management. Graphic replications of screens, as they appear in the program, have been used to provide visual reinforcement for most features.

As an added benefit, you will also find a number of quick reference tables throughout the manual that provide organized reminders for maintenance tasks with multiple-choice options or selections. In most cases, these may be easily copied and posted as convenient reference guides, when needed.

In addition to the information in the manual, there are a variety of help screens available from virtually any location in the program. To get help on a specific field within a window, just position the cursor at the field and press the F1 function key. You will find an explanation of that particular field along with additional and related reference information.

To fully understand the features and benefits of *CMS Attendance for Windows* we suggest that you take the time to browse this manual before using the software. A basic understanding of Attendance's features and functions will help you decide which ones are necessary for your congregation. We also suggest that you read the *Getting Started Manual.* It highlights the major features of *CMS Attendance for Windows* and provides a quick reference tutorial. Use the *Table of Contents* and *Index* to quickly find information and help.

Contacting Customer Support

For toll free customer support, call the Software Library at (800) 247-8044.

Installing Attendance for Windows

Installation instructions for *CMS Attendance for Windows* are included with the software as a separate document.

The Upgrade command on the File menu is reserved for use with future system upgrades from Church Management Solutions. Upgrade instructions will accompany the shipment of the system upgrade.

Organizing Attendance Data Entry Tasks

Organizing Attendance Data Entry Tasks Overview

Implementing your new system requires that you enter the information from your current system, into the windows and fields of *CMS Attendance for Windows*.

In this chapter, we will outline the steps you must follow for the two basic data entry tasks:

- Entering Attendance Options

- Entering Household and Person Information

NOTE: The household, person and system information you enter into the *CMS for Windows* system can be used by *CMS Membership for Windows*, *CMS Contributions for Windows,* and *CMS Attendance for Windows*. Your strategy for data entry will depend on which of the three modules you are using and when you intend to implement them.

- If you are implementing Attendance, Contributions, and Membership at the same time, use *CMS Membership* for person database. See "Organizing Membership Entry Tasks" in the *CMS Membership for Windows User's Guide* for more information. Then, see "Entering Attendance Options" in this chapter to enter the specific information necessary to run *CMS Attendance for Windows*.

- If you are already using *CMS Membership for Windows*, your household and person information will already be in place. To enter the specific information necessary to run *CMS Attendance for Windows*, see "Entering Attendance Options" in this chapter.

- If you are using *CMS Attendance for Windows* separately, follow "Entering Attendance Options" and "Entering Household and Person Information." Both of these sections are in this chapter.

Remember, you can enter basic household and person information from any module, and you can enter or update household and person information as you are entering attendance.

Before you begin, we suggest that you review the "Taking a Quick Tour" chapter of the *CMS Attendance for Windows Getting Started Manual*.

Entering Attendance Options

Before beginning, you must gather information for the following areas:

⇒ Attendance Codes

Define the different codes. Attendance Codes are used to assign a 'Present' and 'Absent' status to individuals. Refer to "Maintaining Attendance Codes" on page 31.

⇒ Groups

Determine which groups need to be defined. Groups are lists of individuals who participate in specific activities where attendance records are kept. For example, the entire membership may be part of the 'worship service' group, while other groups may be set up to track attendance in Sunday School classes, Bible study groups, or other events/activities. Refer to "Groups" on page 73.

Entering Household and Person Information

Gather Membership (Household) Information

REMINDER: If you have already implemented *CMS Membership for Windows* or *CMS Contributions for Windows*, it is not necessary to complete this step. *CMS Attendance for Windows* will access the same household and person information you are already using.

Get existing information from your current membership lists or your rolodex. You can poll membership to gain additional information. While this is an excellent idea, do not delay your installation waiting for questionnaires to be returned.

⇒ Enter name, label name, address and phone information for each household on the Household window.

⇒ Print Labels, review them and make necessary modifications.

Define Persons, Membership and Participation Status's
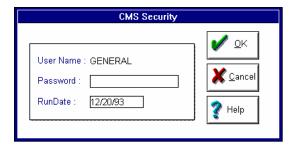
Membership status (i.e. member, non-member, etc.) and Participation status (i.e. student away at school, homebound, etc.) is assigned to each member. (See "Entering Person Data" on page 56 for information about Membership and Participation Status's.) If you enter person data without entering these codes, you will be forced to go into each record again at a later time. Many of these status's are already defined for you. Display the Membership and Participation Code Tables (Define Codes from the Options menu) to make the necessary additions and deletions. Remember to consider what information is required on your congregational reports when modifying these tables.

⇒ Define membership and participation status's.

⇒ Enter person (family member) names on the person portion of the Household window, or on the Person Summary window.

Opening & Exiting CMS

Opening CMS for Windows

1. From the Windows™ Program Manager, double click the *CMS for Windows* icon or the *Working Model* icon if you are using the *CMS for Windows Working Model*. The CMS Security dialog will display.

CMS Security

User Name : GENERAL

Password :

RunDate : 12/20/93

✔ OK
✖ Cancel
? Help

2. Enter your password in the password field. For security reasons, the password entry does not display. To view what was typed into the password field, click the right mouse button. Click OK.
   (If you are opening *CMS for Windows Attendance* for the first time, or if you are using the *CMS for Windows Working Model,* **enter the default password CMS**.)

3. At the opening window, click the Attendance button to start the application. The main menu bar will display.

File CMS People Process Reports Options Help

Exiting CMS for Windows

◆ Choose Exit from the file menu or click the control-menu box and choose Close to exit *CMS for Windows*.

Basic Navigation

Basic Navigation Overview

If you are already familiar with working in the Windows™ environment, you will find CMS intuitive and easy to operate. However there are some functions, such as the look-up button, that are unique to this system. These functions, as well as some of the common Windows™ operating functions are explained here.

In this chapter, we will cover:

- Mouse and Pointer

- Menus

- Toolbar

- Making Selections

- Data Entry

- Keyboard Shortcuts

Mouse and Pointer

A mouse is required to operate *CMS Attendance for Windows*. With it, you can select functions, push buttons, place the cursor in a specific field, and use the toolbar shortcuts. Many mouse actions also have keyboard equivalents. These methods are also defined throughout the manual.

Pointer Use the mouse to move the pointer about the screen. The tip of the pointer indicates the exact position of the pointer.

Cursor The pointer will change into an I-beam cursor when the pointer is moved inside a text box. Clicking the I-beam will establish a location for typing text.

Hourglass When CMS pauses to complete a complex task, the pointer will appear as an hourglass. Wait until the pointer returns before starting another activity.

Mouse Actions Unless otherwise specified (or if you have used the Windows™ Control Panel to swap the functions of the mouse buttons) use the left mouse button to click and double click.

Click	Press and release the left mouse button.
Double Click	Press and release the left mouse button twice rapidly.
Right Click	On a date field, press and release the right mouse button to view and select from the built-in calendar.

Menus
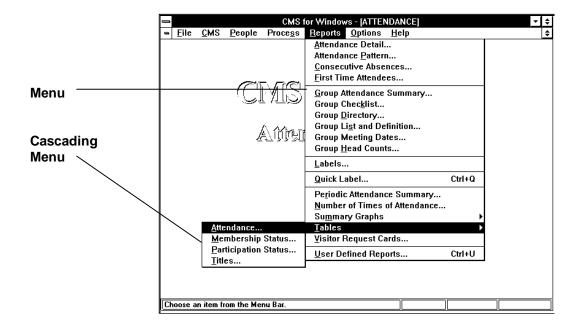
The Menu Bar lists the available menus. When you click on a menu heading, the menu will drop down to show a list of menu items. To choose from the menu, click on a menu option, or use the keyboard shortcut command. For more information on keyboard shortcuts, refer to "Keyboard Shortcuts" on page 24.

Main Menu Bar

File   CMS   People   Process   Reports   Options   Help

Cascading Menus
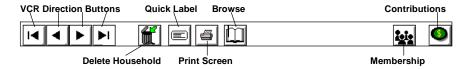
In some cases, selecting a menu item will cause a *cascading menu* to appear. Click on an option in the cascading menu to initiate an action.

Menu

Cascading Menu

```
═                       CMS for Windows - [ATTENDANCE]              ▼ ♦
 ▭  File   CMS   People   Process   Reports   Options   Help             ♦
                                    Attendance Detail...
                                    Attendance Pattern...
                                    Consecutive Absences...
                                    First Time Attendees...
                        CMS         Group Attendance Summary...
                                    Group Checklist...
                                    Group Directory...
                        Atten       Group List and Definition...
                                    Group Meeting Dates...
                                    Group Head Counts...
                                    Labels...
                                    Quick Label...              Ctrl+Q
                                    Periodic Attendance Summary...
                                    Number of Times of Attendance...
                                    Summary Graphs                   ▶
            Attendance...           Tables                           ▶
            Membership Status...    Visitor Request Cards...
            Participation Status...
            Titles...               User Defined Reports...     Ctrl+U

  Choose an item from the Menu Bar.
```

Toolbar

A toolbar displays at the top of the Household window and person windows. It allows easy access to commonly used functions. To choose a function, click on the icon (button).

Household and Person Window Toolbar

VCR Direction Buttons

The VCR direction buttons allow direct access to the first and last household and person records, and the ability to scroll through each record one at a time.

1. To view the *first* household/person record alphabetically, click the

    (first record) direction button.

2. To view the *last* household/person record alphabetically, click the

    (last record) direction button.

3. To view the *next* household/person record, click the (next alphabetically listed) direction button.

4. To view the *previous* household/person record alphabetically, click the

    (previously alphabetically listed) direction button.

Delete Household/Person (Garbage Can) Button

The Delete Household/Person button is used to delete the currently displayed household or person record.

Use caution when deleting a record as it erases all information associated with the household or person, (including membership data in the *CMS Membership for Windows* or *CMS Contributions for Windows* modules). For more information, see "Deleting a Household" on page 45 and "Deleting a Person" on page 60.

Quick Label Button   The Quick Label button prints a mailing label for the selected household or person. Several label formats are available for you to choose from. For more information, see "Printing a Quick Label" on page 101.

Print Screen Button   The Print Screen button will generate a screen print of the displayed Household window or any of the person windows. Printouts can be used as guides for entering information for other households or persons.

To print a record:

1. Check to be sure your printer is ready with the paper in the printer.

2. Use the Find function or the direction buttons to display the Household or person window.

3. Click the Print Screen button located at the top of the window.

4. Click OK when the Print File dialog displays. A Printer Spooler window will display while the window is printing. (If you wish, you can CANCEL (abort) the print request.)

Browse Button   If you need to locate a household or person from information other than the name or envelope number, use the browse function. For example, if you know only a social security number, you could create a browse list by social security number to locate a specific person. You can browse through your household or person lists by any field of information.

See "Browsing for a Household" on page 48, or "Browsing for a Person" on page 63 for more information.

Membership Button   For use with *CMS Membership for Windows* available through *Church Management Solutions*. Click the Membership button to display a cascading menu. From the menu, select a membership information area. *CMS Membership for Windows* will open with the requested information in view.

Contributions Button

For use with *CMS Contributions for Windows* available through *Church Management Solutions*. Click the Contributions button to display a cascading menu. From the menu, select a contributions information area. *CMS Contributions for Windows* will open with the requested information in view.

Making Selections

Choosing and Selecting Items

The terms *choose* and *select* have different meanings. Choose an item to carry out an action. For example, choosing an item from a menu means starting the procedure, process or report. Selecting an item usually means marking it with the cursor. This highlights it, but does not start an action.

Command Buttons

Command Buttons are found on windows or dialogs and are used to carry out a command or open another dialog. The Print, Cancel and Help buttons are examples of command buttons.

Choose a command button by moving the mouse pointer within the command button and clicking the (left) mouse button. On some command buttons, such as Name Range... and Member Status..., the name is followed by an ellipsis (...). This means that the command button will open another dialog rather than immediately begin an action.

Command buttons are listed below in alphabetical order.

Command Button	Location/Function
Add	Found on the Main Household window. Displays a new (blank) Person Summary for entry of a new person.
Add Person (this Household)	Found on the Main Household window and all person windows. Displays a new (blank) Person Summary window for entry of a new person.
Backup	Found on the Backup Confirmation dialog box. Exits *CMS for Windows* and accesses the Backup dialog box.
Cancel	Found on Various dialog boxes. Exits the dialog, ignoring any new selections and leaving the previous selections unchanged.

Close

Found on Various dialog boxes.

Close the current windows. Changes to the current window are automatically saved.

Continue

Found on the Backup Confirmation dialog box.

Continues the selected process without making a new backup.

Define

Found on the Groups dialog box.

Allows definition of a new attendance group.

Delete

Found on the Main Household window.

Deletes the selected person's data.

Find

Found on the Main Household window and all person windows.

Finds a specific person or household record by first name, last name or envelope number.

Help

Found on Various dialog boxes.

Provides access to on-line help instructions.

Main Menu

Found on the Main Household window and all person windows.

Exits the current window and returns to the main menu bar.

New

Found on the Groups dialog box.

Allows addition of a new attendance group.

New Household

Found on the Main Household window and all person windows.

Displays a new (blank) Household window which is ready for entry of a new household.

OK

Found on Various dialog boxes.

Accepts your selections and executes the command.

Preferences

Found on the Groups dialog box.

Sets preferences for attendance entry.

	Found on Report dialog boxes.
Print	Prints the selected report.
Select	Found on Various dialog boxes.
	The Select button is used to confirm the selection of a highlighted description. To select a code, click on the code or description, then click the Select command button. You may also double click on an item to complete a selection.
Undo Changes	Found on the Main Household window and all person windows.
	Removes any changes made to the household or person record currently in view.
View	Found on the Main Household window.
	Displays the Person Summary window with the selected person's data.
View Household	Found on all person windows.
	Returns to the selected person's Household window.

Selection Dialog Box Command Buttons

The Add, Add All, Remove, and Remove All command buttons are found on selection dialogs. For example, they are found on the Select Member Status dialog for reports.

Add >	The A*dd* command button selects one item at a time. Click on the item to select, then click the *Add* command button. The item selected will now be displayed (in bold) on the selected list of the dialog.
Add All >>	The *Add All* command button selects all of the items. Click on the *Add All* command button. All of the items will now be displayed (in bold) on the selected list of the dialog.
< Remove	The *Remove* command button removes one item at a time from the selected list. Click on the item to remove, then click the *Remove* command button. The item you remove will now be deleted from the selected list of the dialog.
<< Remove All	The *Remove All* command button removes all of the items from the selected list. Click on the *Remove All* command button. The selected items list will clear. If you wish, you can begin your selections again.

Add and Delete Command Buttons

The Add and Delete buttons can be used to add or delete codes, (i.e. Membership and Participation). Code tables can be accessed and maintained from the Options menu or from the look-up table buttons on the Attendance Household, Summary, and Attendance Detail windows. See "Selection Dialog Box Command Buttons" on page 19 for detailed instructions on adding and removing items from the look-up table dialogs.

You can use password security to restrict maintenance access to code tables. See "Password Maintenance" on page 150 for detailed instructions.

The *Add* command button is used to add a new item to the list. Click the Add command button to add a new code to the bottom of the list. To position the code elsewhere in the list, position the cursor in the list before clicking the Add button.

The *Delete* command button is used to delete an item from the list. Place the cursor anywhere in the line to delete and click the Delete command button. A message will dialog display. Click 'Yes' to complete the deletion, or 'No' to cancel the command.

Person Window Tabs
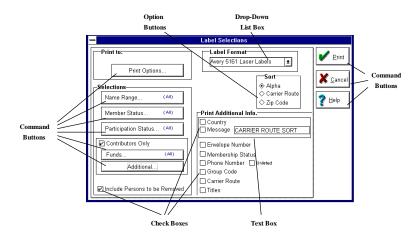
The tabs on the person windows access windows containing Summary and Detail information for the person. Click one of the tabs, choose the command from the People menu or press the appropriate Shortcut key (see "Keyboard Shortcuts" on page 24) to display the window associated with the tab.

Two tabs are used to display person record windows. The tab for the window you are viewing is placed in the forefront.

Person Window Tabs	Shortcut Key Function
Summary	F4 Displays the Person Summary window.
Detail	F2 Displays the Person Detail window.

Text Boxes *Text Boxes* are used to type information. Examples include name and address text boxes. Enter information by moving the mouse pointer into the text box and clicking the mouse button. If the text box is empty, an I-beam cursor will display and you can begin typing. If the box contains information, click the mouse again to position the cursor for text entry.

Check Boxes *Check Boxes* are used to select an option. The options under *Print Additional Info.* on the Label Selections dialog are examples of check boxes.
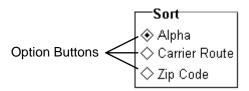
Select a check box by moving the mouse pointer to the box, then click the left mouse button. A check mark will display in the box. To remove the check, click on the mouse again.

Option Buttons *Option buttons* are used to select *only one* option from a group of choices. Option buttons are sometimes called *radio buttons* because like the push buttons on a car radio, when one option button is pushed the others are released.
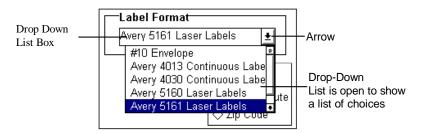
Select an option button by moving the mouse pointer to the option button, then click the mouse button. The choice is marked with a black dot, while the black dot is removed from the previous choice.

Drop-Down List Button
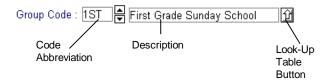
Drop-down list buttons are often used when there is insufficient room in the dialog to display all of your choices. The current selection is displayed in the drop-down list box.

Click on the arrow in the list box to open the drop-down list and display the choices. To select an item, click on it with the mouse. (If all the choices are not in view, scroll bars are provided.)

Look-up Tables
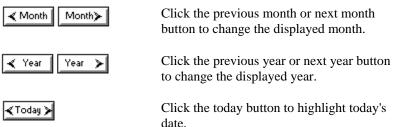
Look-up Tables are slightly different than drop-down list boxes. *Look-up Tables* open a dialog box (rather than a list) from which you can make a selection. In some cases, scroll buttons are provided so that you can select a code by scrolling through the abbreviations. Only the current selection is displayed in the box. Click on the button in the box (or enter CTRL + Spacebar on the keyboard) to open a dialog with a list of choices.

Built-In Calendar

Click the right mouse button on any date entry field to display the Calendar dialog box. Select a date for automatic entry into the data entry field.

  Click the previous month or next month button to change the displayed month.

  Click the previous year or next year button to change the displayed year.

  Click the today button to highlight today's date.

Once the date is highlighted, click the Select command button to select the date and automatically insert it into the data entry field.

Data Entry

1. Use the mouse, TAB key or Enter key to advance the cursor to the appropriate field. Notice that once selected, the field is highlighted.

2. If you start to type text into the field while it is highlighted, any existing text will be replaced with the new text. Click on the field a second time to get a text I-beam. Use the arrow keys to position the cursor within the text, then add and delete as necessary. The Undo Changes command button erases a new entry in case of an error.

Keyboard Shortcuts

The keyboard can be used instead of the mouse to execute a menu selection or a command button.

ALT Key

Each menu heading has an underlined letter. To select a menu, hold down the ALT key and type the letter. Each of the menu selections also has an underlined letter. To select a menu item, type the underlined letter.

You will find an underlined letter within most command buttons (Main Menu, Find, Select, Cancel). To select the command button from the keyboard, hold down the ALT key and type the underlined letter.

CTRL Key

Some menu commands have shortcut keys. These shortcuts are displayed on the menu to the right of the menu command. For example, CTRL H (hold down CTRL and type H) at the main menu will access the Household window.

Function Keys

Function keys can be used to access the Summary (F4) and Detail (F2) windows from any of the person windows.

Using Online Help

Getting Help
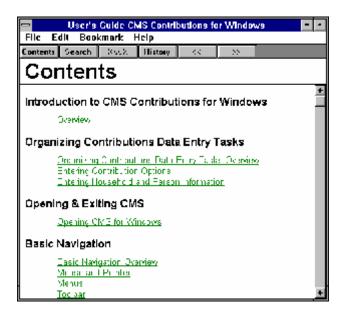
Online Help is a quick way to find information. It provides the same information as the printed manual, but with Online Help, you can search for task information and display it on your computer screen.

Refer to the *"Microsoft Windows User's Guide."* for a complete explanation of using Online Help.

Displaying Online Help

You can get help on a specific field, or use the Help Table of Contents or Help Search feature to select a topic.

◆ Position the cursor on a field and press the F1 function key. Help information for that specific field will display. Use the Help buttons, the scroll bar, and the PAGE UP and PAGE DOWN keys to view all of the information for the selected topic.

◆ Choose Help from the Help Menu (ALT H) to display the Help Table of Contents. Click on a topic in the Table of Contents or use the available tools (Search, Back, History, <<, >>) to select a topic.

User's Guide CMS Contributions for Windows

File   Edit   Bookmark   Help

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Opening CMS for Windows

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Online Help Tools

Maximizing the Online Help Window

▲ If you want to maximize (enlarge) the Help window, click the Maximize button. It is located on the upper right corner of the Help window.

Glossary

Glossary terms are shown in green with a dotted underline. Click on the term to display a pop-up glossary description.
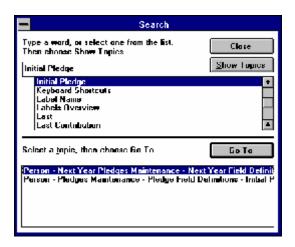
Hypertext Links

A hypertext link is shown in green and is underlined. Its purpose is to inform you that there are other topics which are related to, or further describe the topic you are currently viewing. Click on the hypertext link (the green text) to view the information. Click Back to return to the originating window.

Hypertext Link ⟍

Finding Existing Persons

Search

1.   Click the Search button to view the search Dialog.

2. Enter a word, or select one from the list. Then click Show Topics.

3. The corresponding topics will be listed on the bottom of the dialog. Select a topic, then click Go To.

The Help topic will display.

Online Help Command Buttons
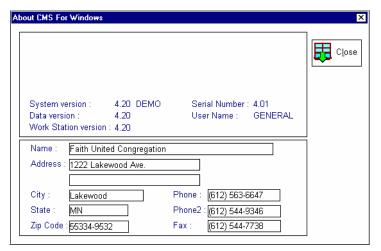
Use the Help buttons to search for information by topic, access the 'live' Table of Contents, move forward and backward through the document, and view glossary terms.

Contents	Click the **Contents** button (ALT C) to return to the Table of Contents list. Click on any topic line to quickly jump to its supporting text. Use the scroll bar or the PAGE UP and PAGE DOWN keys to view the entire list.
Search	Click on the **Search** button (ALT S) to view the topics available for automated searching. At the Search dialog box, enter a word or select one from the list. Click Show Topics to display all corresponding topics. Select a topic, then click Go To to view the information for that topic. (Refer to "Search" on page 26.)
Back	Click the **Back** button (ALT B) to return to the previous help screen. This is different from the << (backward) button which only backs up within the same chapter. If you have been using Search or a hypertext jump to view information located in different chapters, Back will take you back to the last window you were viewing - regardless if it was in the same chapter or topic area.
History	Click the **History** button (ALT H) to view a sequential list of every help topic viewed during the current on-line help session.

>>	The >> button will lead you through an entire chapter. When you click on a topic at the Table of Contents, you will see the first help window associated with that topic. Click the >> button to lead you through all topics in the chapter. When the >> button is grayed out, it means that there are no more topics to view.
<<	The << button goes back one window in the same topic. It is the opposite of the >> button.
Glossary	Click the **Glossary** button (ALT G) to display the list of glossary terms. Click on a term to view the glossary definition.

About Help

The "About CMS For Windows" dialog displays when About is selected from the Help menu (ALT + H, A). In addition to providing *CMS Attendance for Windows* version and user information, it also stores the name, address, and phone numbers of the congregation. The city, state, and zip code information entered on this dialog is used as a default for entering household addresses. The entire congregation address is printed on statements and reports.

Viewing and Entering About Help Information

1. From the Help menu on the main menu bar, choose About (ALT + H, A). The About CMS For Windows dialog displays.

2. Refer to "About Help Field Definitions" for field definitions and data entry instructions.

3. Click:

Close (ALT + l) to exit the "About CMS For Windows" dialog.

About Help Field Definitions

Don't forget that CMS provides online help on the window. Press the F1 function key.

Field	Definition
System version	Displays the System version number.
Data version	Displays the Data version number.
Serial Number	Displays the Serial Number.
User Name	Displays the User Name.
Name	Enter the Name of the license holder.
Address	Enter the Address of the license holder. Two address lines are provided.
City	Enter the City of the license holder.
State	Enter the State of the license holder.
Zip Code	Enter the Zip Code of the license holder.
Phone	Enter the primary phone number of the license holder.
Phone2	Enter the secondary phone number of the license holder.
Fax	Enter the fax phone number of the license holder.

Setting Attendance Options

Attendance Options Overview

Attendance options should be set up before building the household/person database. See "Organizing Attendance Data Entry Tasks" on page 5 for detailed advise about getting started with *CMS Attendance for Windows*.

In this chapter, we will cover:
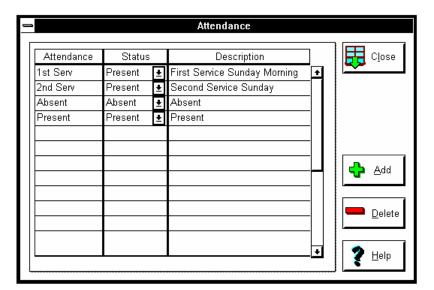
- Maintaining Attendance Codes

- Membership Status, Participation Status and Titles

- Find Method

Also see "Groups" on page 73 to create and define attendance groups.

Maintaining Attendance Codes

Attendance Codes are used to assign a 'present' and 'absent' status to individuals as they participate in different events or activities. While the two codes, 'present' or 'absent', would usually be sufficient to describe an individuals' attendance, the flexibility to assign additional codes is ideal for entering attendance in multiple worship services. For example, you might define a worship service attendance group consisting of all active members. Then, you can define attendance codes representing 'present for the first service', 'present for the second service', etc. Entering attendance for the different services is simply a matter of choosing the appropriate attendance code for each individual in the worship service group.
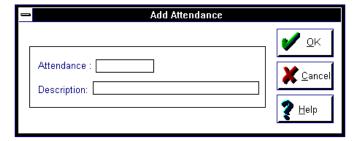
If you wish to also track communion participation, create a combined code for the service and communion and a separate code for service attendance but no communion participation.

◆ Choose Attendance Codes from the Options menu. The Attendance dialog box displays.

```
┌─────────────────────────────────────────────────────────────────┐
│ ▬                          Attendance                             │
├──────────────────────────────────────────────────┐  ┌─────────┐ │
│ ┌──────────┬──────────┬────────────────────────┐  │  │ ▓▓ Close│ │
│ │Attendance│  Status  │     Description         │  │  └─────────┘ │
│ ├──────────┼──────────┼─────────────────────────┤ ▲│            │ │
│ │1st Serv  │Present ▼ │First Service Sunday Morning│ │           │ │
│ │2nd Serv  │Present ▼ │Second Service Sunday    │  │            │ │
│ │Absent    │Absent  ▼ │Absent                   │  │            │ │
│ │Present   │Present ▼ │Present                  │  │            │ │
│ │          │          │                         │  │            │ │
│ │          │          │                         │  │  ┌────────┐ │ │
│ │          │          │                         │  │  │ ✚  Add │ │ │
│ │          │          │                         │  │  └────────┘ │ │
│ │          │          │                         │  │            │ │
│ │          │          │                         │  │  ┌────────┐ │ │
│ │          │          │                         │  │  │▬ Delete│ │ │
│ │          │          │                         │  │  └────────┘ │ │
│ │          │          │                         │ ▼│            │ │
│ └──────────┴──────────┴─────────────────────────┘  │  ┌────────┐ │ │
│                                                     │  │ ? Help │ │ │
│                                                     │  └────────┘ │ │
└─────────────────────────────────────────────────────────────────┘
```

Adding Codes

1. Click the Add button. The Add Attendance dialog box will display.

2. Enter the abbreviation for the attendance code in the Attendance box and the description for the attendance code in the Description box.

NOTE: Keep in mind that the Attendance Pattern report and the calculated table on the groups window will only print or display the first character of an attendance code. It is recommended the first letter or number of the attendance code be unique.

```
┌────────────────────────────────────────────────────────┐
│ ▬                    Add Attendance                     │
├──────────────────────────────────────────┐  ┌────────┐ │
│                                           │  │ ✔  OK  │ │
│  Attendance : [_____]                  │  └────────┘ │
│                                           │  ┌────────┐ │
│  Description: [_____]      │  │✖ Cancel│ │
│                                           │  └────────┘ │
│                                           │  ┌────────┐ │
│                                           │  │ ? Help │ │
│                                           │  └────────┘ │
└────────────────────────────────────────────────────────┘
```

3. Click:

   <u>O</u>K *(ALT + O)* to complete the addition and return to the Attendance dialog.

   <u>C</u>ancel *(ALT + C)* to cancel the entry.

Attendance Code Field Definitions

Don't forget that CMS provides online help on the window. Press the F1 function key.

Field	Description #/Char-acters	Definition
Attendance	up to 10 alpha/numeric	Enter an abbreviation for the attendance code. (i.e. absent, present, 1st Serv, 2nd Serv).
Status	⬇ Status drop down list button	Status is either absent or present. Choose the proper status for the code.
Description	up to 35 alpha/numeric	Enter the full description for the attendance code. (i.e. First Worship Service., Second Worship Service., etc.).

Deleting Codes

◆ Place your cursor on the line of the attendance code you wish to delete. Click the Delete button.

NOTE: CMS will detect if you are deleting a code that is in use. If so, a window will display to asking you to reassign the entered attendance to an existing attendance code.

Membership Status, Participation Status and Titles

The Membership Status (Received through Baptism, Transferred from Different Denomination, Prospective Member), Participation Status (Active, Student Away at School, Associate Member), and Titles (Mr. & Mrs., Mr., Dr. & Mrs., Ms.) code tables are used in the Person Summary window to help enter person information. The Titles code table is also used in the Household window to define the family name.

To simplify your setup procedures, sample codes and definitions have been pre-defined for you when you install CMS. Add and change these tables as necessary.
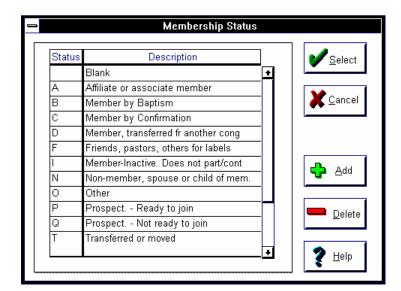
If you are using both *CMS Membership for Windows* and *CMS Contributions for Windows*, the person and household records are shared. They can be modified in either application.

Adding Codes   You are able to add and delete codes only if you have the proper security assigned to your password.
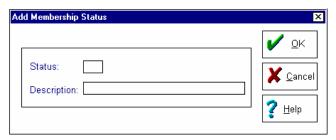
The code table also displays when you click on a look-up table button to select a code on the Household window or any of the person windows. Codes can be added or deleted from the look-up table.

1.   Choose Membership Status, Participation Status or Titles from the Options menu. A different dialog will display for each choice.

SAMPLE Code Table - Membership Status

2. Click the Add button. An Add dialog will display.

3. Type the code status and the description in the fields provided. Refer to "Code Table Field Definitions" on page 36 for further information. (Note: on-line help provides data entry instructions for each field. Position the cursor in the field and press the F1 function key.)

4. Click:

OK (ALT + O) to complete the addition and return to the Code Table dialog.

Cancel (ALT + C) to cancel the entry.

5. Repeat the above to add additional items.

6. Click:

Close (ALT + l) to close the Code Table dialog and return to the main menu bar. CMS automatically saves your entries when you close the code table dialog.

Code Table Field Definitions

Don't forget that CMS provides online help on the window. Press the F1 function key.

Code Table	Code #/Char-acters	Description #/Char-acters	Definition
Member-ship Status	1 alpha/ numeric	up to 35 alpha/ numeric	Define the possible membership status's (i.e. Received by Affirmation of Faith, Received through Baptism, Transferred from Different Denomination, Prospective Member, Inactive, etc.).
Partici-pation Status	1 alpha/ numeric	up to 35 alpha/ numeric	Define the possible participation status's, (i.e. Active, Student Away at School, Associate Member, Inactive, etc.).
Titles	1 numeric	up to 10 alpha/ numeric	List the possible couple or person titles or salutations, (i.e. Mr. & Mrs., Mr., Dr. & Mrs., Ms., etc.).

To Change a Code

You can change the description of a Membership Status, Participation Status, or Title but you cannot change the one character code. If you need to change the code, delete it then re-add it with the correct code and description.

1. Choose Membership Status, Participation Status, or Titles from the Options Menu.

2. Position the cursor next to the text which needs to be changed.

3. Refer to "Code Table Field Definitions" above for specific field instructions. Make the necessary corrections to the description.

4. Click:

    Close (ALT + l) to return to the main menu bar.

To Delete a Code

You will not be allowed to delete a code that is currently in use. If you have *CMS Membership for Windows*, use the Locate and Replace function to locate all useages of the code and replace it with another code. If you do not have *CMS Membership for Windows*, print out Labels for all names and include the codes on the label. Look through the labels and find those with the codes you wish to delete. Use person maintenance to change the codes.
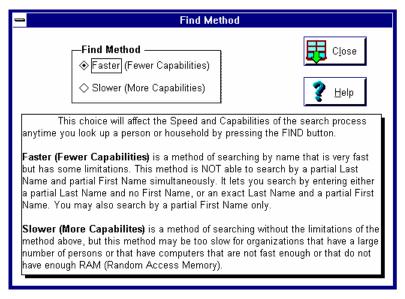
1. Choose Membership Status, Participation Status, or Titles from the Options Menu.

2. Click anywhere on the code you want to delete.

3. Click the Delete button. At the confirmation dialog, click 'Yes'.

4. Click:

    Close (ALT + l) to return to the main menu bar.

Find Method

The find function, available from the Household or Person windows, may be defined for *faster* or *slower* searches. The fast method does not allow you to search by a partial Last Name and partial First Name simultaneously. The slower allows such partial searchs, but searches will take more time, depending on the size of the name list, and the speed and memory of the computer you are using.

1. Choose Find Method from the Options Menu.

Find Method

Find Method
◈ Faster (Fewer Capabilities)
◇ Slower (More Capabilities)

[Close]

[Help]

This choice will affect the Speed and Capabilities of the search process anytime you look up a person or household by pressing the FIND button.

Faster (Fewer Capabilities) is a method of searching by name that is very fast but has some limitations. This method is NOT able to search by a partial Last Name and partial First Name simultaneously. It lets you search by entering either a partial Last Name and no First Name, or an exact Last Name and a partial First Name. You may also search by a partial First Name only.

Slower (More Capabilites) is a method of searching without the limitations of the method above, but this method may be too slow for organizations that have a large number of persons or that have computers that are not fast enough or that do not have enough RAM (Random Access Memory).

2. Select the Faster or Slower option button.

3. Click:

    Close (ALT + l) to return to the main menu bar.

Household Maintenance

Household Maintenance Overview

Household is the key structure for maintaining the CMS Attendance database. In the Household window, you can view and enter household data such as: surname, label name, address, phone numbers, group code, and family (household) members.

Also included in this chapter are instructions for Speed Update. Speed Update will save you time when you need to update the Country, Group Code, or Title for several families.

The following functions are also available from the Household window. They are covered in the other chapters.

- adding and deleting people from the household (see "Person - Summary " on page 53)

- printing a mailing label for the household (see "Labels" on page 101)

- displaying the Person Summary window (see "Person - Summary " on page 53)

CMS Attendance for Windows shares the household and person database with *CMS Membership for Windows* and/or *CMS Contributions for Windows*. If you have purchased multiple applications, use CMS Membership to build your household and person databases. See "Organizing Attendance Data Entry Tasks" on page 5 for more information. Use *CMS Attendance* Household Maintenance if you are using it separately or if you wish to add or change household information while working within the *CMS Attendance* module. Households and persons can be entered while entering attendance.

In this chapter, we will cover:

- Displaying the Household Window

- Entering Household Data

- Deleting a Household

- Finding Existing Households

- Browsing for a Household

- Speed Update - Household

Displaying the Household Window

The Main Menu Bar

◆ From the People menu, choose Household/Persons (CTRL H).

The View Household Button

Use the View Household button to return to the person's Household after viewing any of the person windows. The Person Summary and Detail windows each have a "View Household" button.

◆ Click on the View Household button (ALT W).
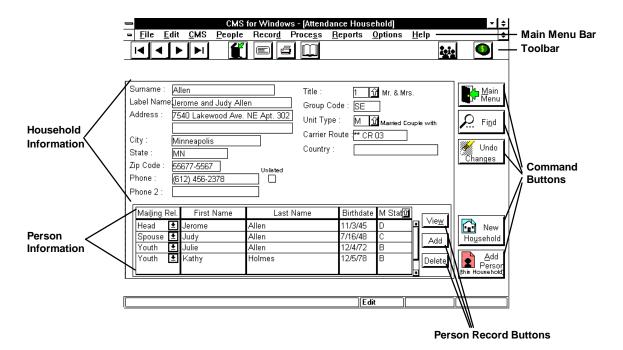
The New Household Button

This displays a new (blank) Household window which is ready for entry of a new household. The Person Summary and Detail windows each have a "New Household" button.

◆ Click on the New Household button (ALT U).

Entering Household Data

To add a new household you must enter all required fields (these are specified in the "Household Window Field Definition Chart" on page 42), add at least one person to the household (refer to "Person - Summary " on page 53), and designate a head of household.

The city, state and zip code fields will be automatically filled when you add a new household from the New Household command button. For these fields, CMS automatically uses the city, state and zip code from the About CMS for Windows dialog. If you wish, you override these automatic entries. See "About Help Field Definitions" on page 29 for more information.

1.   At the main menu, select Household/Persons from the People menu.

2.   Display the appropriate household record, or click on the New Household button to display a new (blank) Household window. For Find instructions, refer to "Finding Existing Households" on page 46.

3. Refer to the "Household Window Field Definition Chart" below to enter or change the household data.

4. Enter person data for the household or enter another household. To add persons to the household, refer to "Entering Person Data" on page 56.

5. CMS automatically saves data when you leave the data window or execute another function (such as adding a person or selecting from the main menu bar). To cancel a new household, click on the Undo New House button before another action is performed. To cancel changes to the household, click the Undo Changes command button before another action is performed.

Household Window Field Definition Chart

If you are unsure of how to enter or select data for the data fields, please refer to "Basic Navigation" on page 11. There you will find information regarding cursor placement, text entry, and pull down lists.

Don't forget that CMS provides online help on the window. Press the F1 function key.

Field Name	Field Length #/Characters	Description
Surname	(Required) Up to 25 alpha/numeric	Enter the last name of the family, or the last name of the head of the household.
Label Name	(Required) Up to 30 alpha/numeric	Type in the household name as it should appear on household labels and mailings. (Examples: Mr. & Mrs. Jerome Allen, Jerome and Judy Allen.) Use the Statement Name field on the Person Summary window to customize the name printed on statement mailings. If you do not enter a label name, CMS will automatically create one for you using the title, head of households' first name, and the surname. * To add a household, you must enter either the label name, or the title, head of households' first name, and surname.

Field Name	Field Length #/Characters	Description

Address (Line 1)	Up to 30 alpha/numeric	Enter the residence and street or route number.
		
		Note: The address will print on labels and envelopes in the order seen on this window. For example:
		
		   Label Name
		   Address Line 1
		   Address Line 2 (if any)
		    City, State, Zip
		       Country

(Address Line 2)	Up to 30 alpha/numeric	Enter the second line of the address. This prints immediately above the line for city, state and zip.
City	Up to 16 alpha/numeric	Enter the city in which the household resides.
State	Up to 12 alpha/numeric	Enter the state or province abbreviation. If using a state, use the 2 character state abbreviation, (AL, MN, TX).
Zip Code	Up to 10 alpha/numeric	Enter a 5 or 9-digit U.S. zip code, or a Canadian 6-digit postal code. If you enter a 9-digit zip code CMS will automatically insert the appropriate punctuation, (55677-2002).
Phone	Up to 18 alpha/numeric	Enter the area code and 7-digit telephone number. It is not necessary to type any parenthesis or dashes. Once you enter the 10-digit telephone number and advance to the next field, CMS will automatically provide the correct punctuation, i.e. (612)566-4212.
Unlisted	Unlisted Check box	Click on the Unlisted check box to check (✔) it or, if it is already checked, to remove the check. A check inside the box indicates that it is an unlisted household telephone number. Reports which print telephone numbers allow you to decide whether or not to print unlisted telephone numbers.
Phone 2	Up to 18 alpha/numeric	Enter a second phone number for the household, i.e. car phone number.

Field Name	Field Length #/Characters	Description
Title	Title look-up button	Click on the Title look-up button to display the list of options, (Mr. & Mrs., Mr., Mrs., Ms. etc.) Once displayed, click on the appropriate choice.
		You can modify Title codes as needed. For instructions, see "Titles" on page 36.
Group Code	Up to 4 alpha/numeric	Group Codes can be used to group households for whatever purposes you wish. For example, if you use a location map to define the household's distance from the church, the group codes can be set up to represent the location map indicator.
		Refer to "Speed Update - Household" on page 50 for a faster method of entering or updating group codes for multiple households.
Carrier Route	Up to 10 alpha/numeric	Enter the carrier route as it should appear on the label and in the format required by the Post Office. The CR (Carrier Route) or RR (Rural Route) should be preceded by two asterisks (**), and followed by a 2-digit or more number.
		Examples: **CR 22 **RR 06 **B 556
		If you are printing a Carrier Route on labels, you must also print the message "CARRIER ROUTE PRESORT" or "CAR-RT SORT." This can be done by typing the message in the message field on the Label Selections dialog. Refer to "Labels" on page 101 for more information.

Field Name	Field Length #/Characters	Description
Country	Up to 20 alpha/numeric	Enter the country in which the household resides (USA, CANADA). The country will print in uppercase, indented beneath the city, state, and zip code line on mailing labels and envelopes.

Deleting a Household

The delete function deletes the household from the database.

CAUTION!!! *All records for the household will be deleted, including CMS Membership and CMS Contributions information if you are using these modules. If you are using CMS Contributions, you will not be allowed to delete persons who have contributions in the current year until the End of Year process is run or the person's contributions are combined with another person's. Refer to the CMS Contributions for Windows User Manual for more information.*

CMS Membership for Windows provides a process for removing a household. The remove process is used to indicate that the household is no longer associated with the congregation - perhaps because of a move, or a change to a different congregation. The Removal process keeps the households' records (including contributions) in the database until the end-of-year procedures are complete. After end-of-year, you can delete the removed records. See your *CMS Membership for Windows User's Manual* for more information.

1. At the main menu, select Household/Persons from the People menu.

2. Display the appropriate household record. For Find instructions, refer to "Finding Existing Persons" on page 61.

3. Click the Garbage Can button on the speed bar. A "Delete Household" message dialog displays.

4. Click:
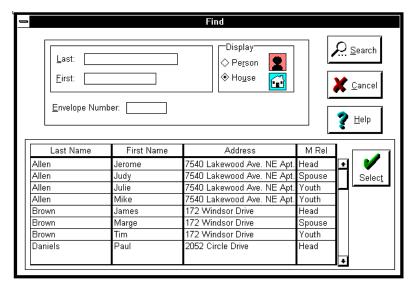
    Yes (ALT + Y) to delete the household.

    No (ALT + N) to cancel the delete request.
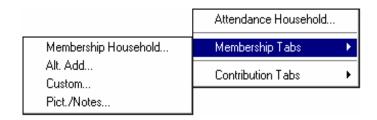
Finding Existing Households

 Find is used to quickly find and display a household. You can find a household based upon last name, first name, and/or envelope number. The find can be based on a full or partial name in the name fields. Also see "Find Method" on page 37 to select a *faster* or *slower* find method.

> 1. At the Household window or any of the person windows, click on the Find button. The Find dialog will display.

> 2. The Find dialog is used to find either households or persons. To find a household, click on the House option button. Note that a dot fills the option button to indicate that it has been selected.
>
> 3. If you are also using *CMS Membership for Windows* or *CMS Contributions for Windows,* you can find a specific Membership or Contributions household record. With your mouse pointed at the House option button, click the right mouse button to display a pop-up window. Point at Membership Tabs or Contribution Tabs to display a cascading menu. Then select the household window you wish to find.

4. Use the chart "Find Field Definitions" below for information on entering the last name, first name, and envelope number. (Note: on-line help provides data entry instructions for each field. Position the cursor in the field and press the F1 function key.)

5. Click the Search button. If there is more than one record which matches the find criteria, a list will display.

6. To select a record, click anywhere on the record line, then click Select (or double click on the line). The Household window will display with the selected household's data.

Find Field Definitions

If no fields are entered, the Search dialog will list all persons in the database.

Don't forget that CMS provides online help on the window. Press the F1 function key.
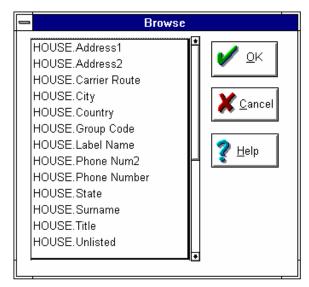
Field Name	Field Length #/Characters	Description
Last	Up to 28 alpha/numeric	Enter the last name of the person or the household surname. You can enter a full or partial name. The ability to enter a partial name is especially useful when you are unsure of how it is spelled. For example, if you enter 'Jo', CMS will list all last names which begin with 'Jo', (Johnson, Jones, etc.).
First	Up to 20 alpha/numeric	Enter the first name of the person. You can enter a full or partial name.
Envelope Number	5 numeric	Enter the exact envelope number (between 1 and 32,700).

Browsing for a Household

The Browse function is very useful for locating a specific household when the first name, last name and envelope number are unknown. Browse can search based on any household information field.
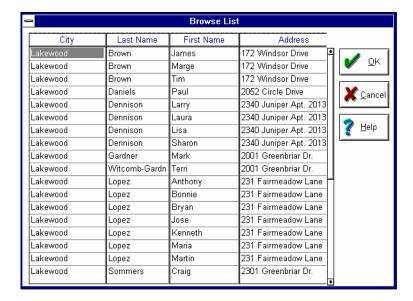
1. To display the Browse dialog, choose Browse from the Record menu or click the Browse button.

2. Use the scroll bar to find the specific field on which to browse. Notice that the household fields are prefixed by HOUSE and the person fields are prefixed by PERSON. If you select a field with the HOUSE prefix, you will locate a household record. If you select a field with the PERSON prefix, you will locate a person record.

   Select the field to browse and click OK, or double click on the field. The Browse List dialog will display.

Example Browse List - HOUSE.City Field

3. From the browse list, select anywhere on the line to look-up and click OK (or double click on the line). The Person Summary window will display with the selected person's data.
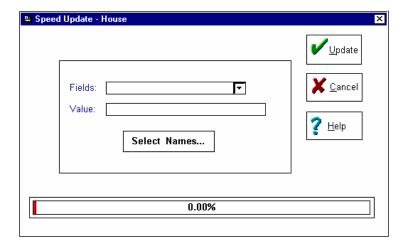
Speed Update - Household

Speed Update will save you time when you need to update the Country, Group Code, or Title for several families at a time.

Running Speed Update - Household

1. Choose Speed Update from the People menu. Select Household from the cascading menu.

2. The Backup Confirmation dialog will display. If you do not have a current backup of data, click Backup to begin the backup procedures. Refer to "Backup" on page 157 for data backup instructions. If you already have a current backup, click Continue to display the Speed Update dialog box.
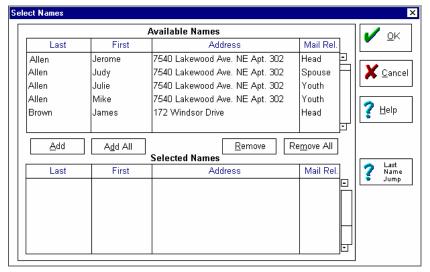
The Speed Update - Household Dialog Box

3. Click the Fields drop-down list button. From the selections, choose Country, Group Code, or Title.

4. If you selected Country or Group Code, type in the name of the country or group code in the Value field.

   If you selected Title, a look-up table button will display next to the Value field. Click on the button to view the Title table. At the table, select the title then click the Select button.

5. Click the Select Names button to view the Select Names dialog box.

6. The dialog consists of two lists. The names which have not been selected will display in bold under "Available Names." The names which have been selected will display in bold in the "Selected Names" column. Use the scroll bars provided to view the complete lists. You can use the buttons located between the lists to add and remove the names. See "Selection Dialog Box Command Buttons" on page 19 for more information. To find a specific name, click in the last name column and then press a letter to jump to the first person with that letter in their last name. (*Esc* clears the name jump field.)

7. Click:

   <u>O</u>K (*ALT + O)* to finalize name selections.

   <u>C</u>ancel (*ALT + C)* to return to the speed update dialog without saving the changes.

   <u>U</u>pdate (*ALT + U)* to begin the Speed Update process. At the message dialog box, click 'Yes' to continue.

8. When the update process is complete, the Process Complete dialog will display. Click OK to return to the main menu bar.

Person - Summary Maintenance

Person - Summary Overview

In the Person Summary window, you can view and enter summary data for the person. This includes name, title, mailing relationship, member status, and participation status. It also displays a list of the attendance groups for the person and the date of last attendance for each group. Groups represent specific activities, or services set up for separate attendance tracking. (To add or delete groups, see "Groups" on page 73.) You can add or delete groups for a person from this window.

Also included in this chapter are instructions for Speed Update. Speed Update will save you time when you need to update the Member Status, Member Title, or Participation Status for several people at a time.

CMS Attendance for Windows shares the household and person database with *CMS Membership for Windows* and *CMS Contributions for Windows*. If you have purchased more than one application, use *CMS Membership* to build your household and person databases. See "Organizing Attendance Data Entry Tasks" on page 5 for more information. Use *CMS Attendance* Person Maintenance if you are using *CMS Attendance* separately or if you wish to add or change person information as you are working within the *CMS Attendance* module. Households and persons can be entered while entering attendance.

In this chapter we will cover:

- Viewing Person Summary Data

- Entering Person Data

- Deleting a Person.

- Finding Existing Persons.

- Browsing for a Person

- Speed Update - Person

Viewing Person Summary Data

Accessing the Summary Window from The Main Menu Bar

1. From the People menu, choose Household/Persons (CTRL, H) to display the Household window.

2. Use the VCR direction buttons or the Find function to display the person's household.

3. Click on the Add Person (this Household) button to add a new person, or the View button to view an existing person.

Accessing the Summary Window with The Add Person Button

The Household window and all person windows each have an Add Person button. Add Person displays the Person Summary window to allow you to add a person to the household which is currently displayed.

You do not have to display the Person Summary window to add a person to the household. You can add the person right on the Household window. This chapter will cover both of these methods.

◆ Click on the Add Person button (CTRL, A).

Accessing the Summary Window with the View Button

The View command button on the Household window displays the selected person's data on the Person Summary window. (The Add button opens a line for adding a person on the Household window.)

Mailing Rel.	First Name	Last Name	Env. No.	M Stat	
Head	Jerome	Allen	1	D	View
Spouse	Judy	Allen		C	Add
Youth	Julie	Allen	2	B	
Youth	Kathy	Holmes	125	B	Delete

◆ To view an existing person's records, click on the person line and click the View button. Alternately, you can double click anywhere on the person line. The Person Summary window will display.
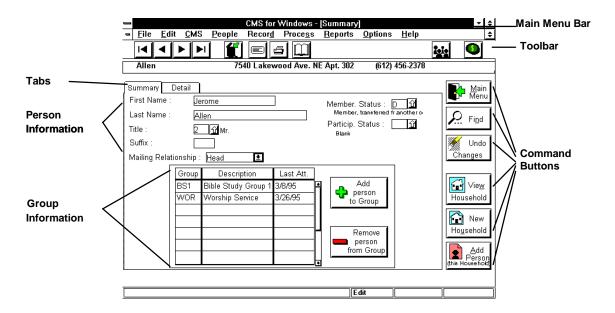
**Accessing the
Summary Window
via the Right Mouse
Button**

You can access any person window directly from the Household window, including person tabs from *CMS Membership* and *CMS Contributions* (if you are using those modules).

1. Place the cursor on the person whose record you wish to view. Click the right mouse button to display the pop-up window.

2. Choose the information area you wish to access.

**The Person
Summary Window**

Entering Person Data

Entering Person Data at the Household Window

This is a convenient method for entering mailing relationships, names, and membership status for people in the household.

1. At the main menu, select Household/Persons from the People menu.

2. Display the appropriate household record. For Find instructions, refer to "Finding Existing Persons" on page 61."

3. For an existing person, click on the field where you will add data.

4. To add a person, click on the Add button at the bottom of the window. The cursor will move to the Mailing Relationship field on the first available line.

5. Refer to the "Person Field Definition Chart" on page 57 to help you enter or change the person data.

6. Continue to enter data for each person within the household. When finished, you can go to the Person Summary window to add additional information or to display detail information. Please refer to "Person - Attendance Maintenance" on page 69 for more information.

7. CMS automatically saves data when you leave the data window or execute any of the functions (such as adding another person or selecting from the main menu bar). To cancel the new person data, click on the Undo Changes button before another action is performed.

Entering Person Data at the Summary Window

1. At the main menu, select Household/Persons from the People menu.

2. Display the appropriate person record. For Find instructions, refer to "Finding Existing Persons" on page 61. From the Household window, click on the person line then click the View button, or click the Add Person button to add a new person.

3. Refer to the "Person Field Definition Chart" on page 57 to help you enter or change the person data

4. Continue to enter data for each person within the household. You can display and/or enter information for each person. Please refer to "Person - Attendance Maintenance" on page 69 for more information.

5. CMS automatically saves data when you leave the data window or execute any of the functions (such as adding another person or selecting from the main menu bar). To cancel the new person data, click on the Undo Changes button before another action is performed.

Adding a Person to a Group

1. Display the appropriate person record. For Find instructions, refer to "Finding Existing Persons" on page 61.

2. Click the Add Person to Group command button. The Groups dialog box displays the available groups.

3. Select the group to which the person is to be added. Click:

   Select (ALT + S) to add the person to the group.

   Cancel (ALT + C) to return to the Person Summary window without saving the changes.

Removing a Person from a Group

1. Display the appropriate person record. For Find instructions, refer to "Finding Existing Persons" on page 61.

2. Select the group you wish to remove and click the Remove Person From Group command button. A warning dialog displays asking "Remove this person and all related attendance information from the group?"

3. Click:

   Yes (ALT + Y) to remove the person to the group.

   No (ALT + N) to abort the remove from group process.

Person Field Definition Chart

If you are unsure how to enter or select data for the data fields, please refer to "Basic Navigation" on page 11. There you will find information regarding cursor placement, text entry, and pull down lists.

The table below defines all fields used for adding a person at the Household window and Person Summary window. They are listed in order of the fields on the Person Summary window.

Don't forget that CMS provides help on the window. To get help on a specific field, position the cursor at the field and press the F1 function key.

Field Name	Field Length #/Characters	Description
First Name	(Required) up to 20 alpha/numeric	Enter the person's first name.
Last Name	(Required) up to 38 alpha/numeric	Enter the person's last name.
Title	 Title look-up button	Click on the Title look-up button to display the list of options, (Mr. & Mrs., Mr., Mrs., Ms. etc.) Once displayed, click on the appropriate choice. You can modify Title codes as needed. For instructions, see "Membership Status, Participation Status and Titles" on page 34.
Suffix	up to 4 alpha/numeric	Enter a name suffix, such as Jr. or Sr.
Mailing Relationship	(Required) Mailing Relationship look-up button	Click on the Mailing Relationship look-up button to display the list of options, (Head, Spouse, Youth, etc.) Once displayed, click on the appropriate choice. There must be one and only one "Head" of household selected. Only one "Spouse" per family is allowed.
Member. Status	 Member Status look-up button	Click on the Member Status look-up button to display the list of options, (Received through Baptism, Received through Confirmation, Transferred from Different Denomination, etc.). Once displayed, click on the appropriate choice. This denotes in what way the person is or is not a member. You can add/delete membership status's as needed. For instructions, see "Membership Status, Participation Status and Titles" on page 34.

Field Name	Field Length #/Characters	Description
Particip. Status	[icon] Particip. Status look-up button	Click on the Participation Status look-up button to display the list of options, (Active, Associate Member, Student Away at School, etc.). Once displayed, click on the appropriate choice. This is used to record the participation level of the person. You can add/delete participation status's as needed. For instructions, see "Membership Status, Participation Status and Titles" on page 34.
Group	up to 3 alpha/numeric	Click the Add Person to Group button to display the groups dialog box. From the Groups dialog box, select a group to fill the Group and Description fields.
Description	up to 40 alpha/numeric	The Group Description is automatically displayed when the Group is selected.
Last Att.	6 digit numeric	The date of last attendance is displayed. The date is derived from the actual detail that was entered

Deleting a Person

The delete function deletes a person's records from the database. This function should be used on rare occasions (such as when deleting a person which was entered in error). Deleting a person will remove that person from the group and delete all attendance details for the person.

> *CAUTION!!! All records for the person will be deleted, including CMS Membership and CMS Contributions information if you are using these modules. If you are using CMS Contributions, you will not be allowed to delete persons who have contributions in the current year until the End of Year process is run or the person's contributions are combined with another person's. Refer to CMS Contributions for Windows User Manual for more information.*

CMS Membership for Windows provides a process for removing a person. You can use the remove process to indicate that the person is no longer associated with the congregation. This can occur due to a move, or a change to a different congregation. The Removal process keeps the person or household's records (including contributions) in the database until the end-of-year procedures are complete, at which time you can delete removed records. See your *CMS Membership for Windows User's Manual* for more information.

1. At the main menu, select Household/Persons from the People menu.

2. Display the appropriate person record. For Find instructions, refer to "Finding Existing Persons" on page 61.

3. Click the Garbage Can button on the speed bar. A "Delete Person" message dialog displays.

4. Click:
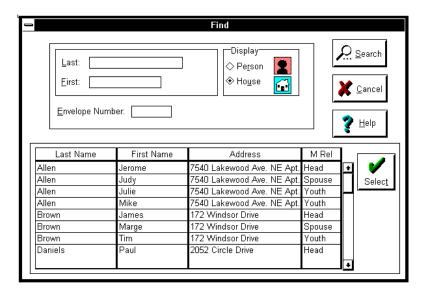
   Yes (ALT + Y) to delete the person.

   No (ALT + N) to cancel the delete request.

Finding Existing Persons
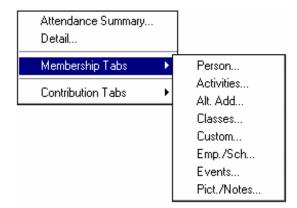
 Find is used to quickly find and display a person. You can find a person based upon last name, first name, and/or envelope number. Full or partial names can be used in the find. Also see "Find Method" on page 37 to select a *faster* or *slower* find method.

1. At the Household window or any of the person windows, click on the Find button. The Find dialog will display.

2. To find a person, click on the Person option button. Note that a dot fills the option button to indicate that person has been selected.

3. You can choose the information area, i.e. Attendance Summary or Detail that will be displayed when you find a specific household. With your mouse pointed at the Person option button, click the right mouse button to display a pop-up window. Select the information area you wish to view for the household you are finding.

   If you are also using *CMS Membership for Windows* or *CMS Contributions for Windows,* you can find a specific Membership or Contributions household record. Point at Membership Tabs or Contribution Tabs to display a cascading menu. Then select the household window you wish to find.

```
┌─────────────────────────────────┐
│  Attendance Summary...          │
│  Detail...                      │
├─────────────────────────────────┤──────────────────────┐
│  Membership Tabs          ▶     │  Person...           │
├─────────────────────────────────┤  Activities...       │
│  Contribution Tabs        ▶     │  Alt. Add...         │
└─────────────────────────────────┘  Classes...          │
                                  │  Custom...           │
                                  │  Emp./Sch...         │
                                  │  Events...           │
                                  │  Pict./Notes...      │
                                  └──────────────────────┘
```

4. Use the "Find Field Definitions" chart on page 63 for information on entering the last name, first name, and envelope number. (Note: on-line help provides data entry instructions for each field. Position the cursor in the field and press the F1 function key.)

5. Click the Search button. If there is more than one record which matches the find criteria, a list will display.

6. To select a record, click anywhere on the record line, then click the Select button. The Person Summary window will display with the selected person's data.

Find Field Definitions

If no fields are entered, the Search dialog will list all persons in the database.

Don't forget that CMS provides online help on the window. Press the F1 function key.
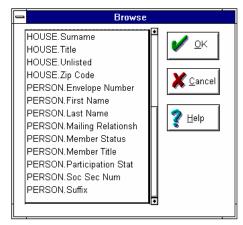
Field Name	Field Length # Characters	Description
Last	Up to 28 alpha/numeric	Enter the last name of the person or the household surname. You can enter a full or partial name.
		The ability to enter a partial name is especially useful when you are unsure of how to spell the name. For example, if you enter 'Jo' in the last name field, CMS will list all last names which begin with 'Jo', (Johnson, Jones, etc.).
First	Up to 20 alpha/numeric	Enter the first name of the person. You can enter a full or partial name.
Envelope Number	5 numeric	Enter the exact envelope number (between 1 and 32,700).

Browsing for a Person

The Browse function is very useful for locating a specific person when the first name, last name and envelope number are unknown. Also, you can browse based on mailing relationship, member status, member title, participation status, social security number and suffix information fields.
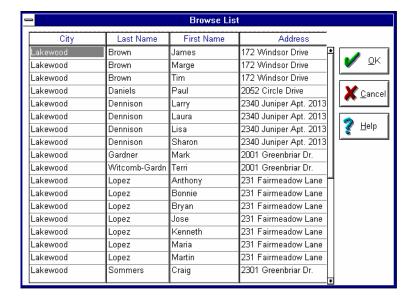
1. To display the Browse dialog, choose Browse from the Record menu or click the Browse button.

2. Find the specific field to browse using the scroll bars as necessary to view the entire list. Notice that the household fields are prefixed by HOUSE and the person fields are prefixed by PERSON. If you select a field with the PERSON prefix, you will locate a person record. If you select a field with the HOUSE prefix, you will locate a household record.

    Select the field to browse and click OK or double click the field. The Browse List dialog will display.

3. From the browse list, select anywhere on the line to look-up and click OK (or double click on the line). The Person Summary window will display with the selected person's data.
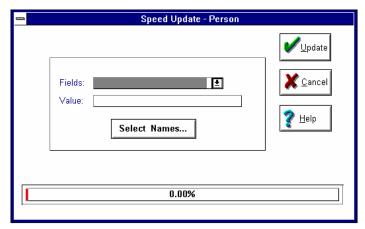
Speed Update - Person

Speed Update will save you time when you need to update the Member Status, Member Title, or Participation Status for several people at a time.
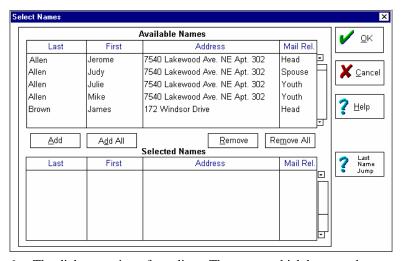
Running Speed Update - Person

1. Choose Speed Update from the People menu. Select Person from the cascading menu.

2. The Backup Confirmation dialog will display. If you do not have a current backup of data, click Backup to begin the backup procedures. Refer to "Backup" on page 157 for data backup instructions. If you already have a current backup, click Continue to display the Speed Update dialog box.

The Speed Update - Person Dialog Box

3. Click the Fields drop-down list button. From the selections, choose
    Member Status, Member Title, or Participation Status.

4. Once a field is selected, a look-up table button will display next to the
    Value field. Click on the button to view the Title table. From the
    table, select the Member Status, Member Title, or Participation Status.
    Click the Select button to return to the Speed Update - Person dialog.

5. Click the Select Names button to view the Select Names dialog box.

6. The dialog consists of two lists. The names which have not been
    selected will display in bold under "Available Names." The names

which have been selected will display in bold in the "Selected Names" column. Use the scroll bars provided to view the complete lists. You can use the buttons located between the lists to add and remove the names. See "Selection Dialog Box Command Buttons" on page for more information. To find a specific name, click in the last name column and then press a letter to jump to the first person with that letter in their last name. (*Esc* clears the name jump field.)

7. Click:

    OK (ALT + O) to finalize name selections.

    Cancel (ALT + C) to return to the speed update dialog without saving the changes.

    Update (ALT + U) to begin the Speed Update process. At the message dialog box, click 'Yes' to continue.

8. When the update process is complete, the Process Complete dialog will display. Click OK to return to the main menu bar.

Person - Attendance Maintenance

Person - Attendance Overview

The Attendance Detail window is used to view or maintain individual attendance records. If you wish to enter attendance for an entire group, refer to "Enter/Edit Attendance" on page 87.

In this chapter, we will cover:

- Viewing Attendance Records

- Adding/Removing Attendance

Viewing Attendance Records
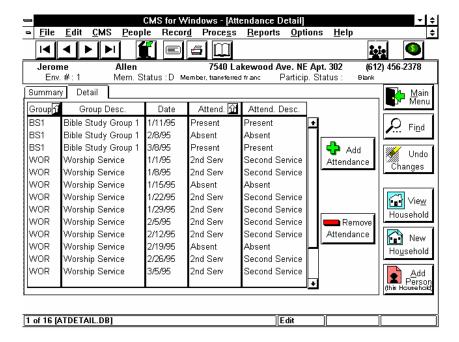
Displaying the Attendance Detail Window

Display the Attendance Detail window from the Attendance Summary window.

1. At the main menu, select Household/Persons from the People menu.

2. Display the appropriate person record. For Find instructions, refer to "Finding Existing Persons" on page 61.

3. From any person window, display the Attendance Detail window in one of the following ways:

- click the Detail tab at any person window

- press the F2 function key at any person window

The Attendance Detail Window

If necessary, use the scroll bar to view the complete list of attendance information.

Attendance Detail Field Definitions

Field Name	Field Length #/Characters	Description
Group	⬆ Group Look-up button.	Enter the group code or click the Group Look-up button to display the groups dialog box. From the Groups dialog box, select a group to fill the Group and Group Descriptor fields.
Group Descriptor	Display only	The Group Descriptor is automatically displayed when the Group Code is selected.
Date	6 digit numeric	Date of attendance. Enter up to a 6-digit numeric date. Slashes will be inserted after each 2 digits, or when the spacebar is pressed. (For example, entry of 122478 will be interpreted by CMS as 12/24/78. Entry of 12478 will not be correctly interpreted as 12/4/78 without depressing the spacebar or typing a "/" after the 4 or entering 120478,)
Attend.	⬆ Attendance Look-up button.	Enter the valid code or click the Attendance Look-up button to display the Valid Attendance dialog box. From the Valid Attendance dialog box, select a valid code to fill the Group and Group Descriptor fields.
Attend. Desc.	Display only	The Attendance Code Descriptor is automatically displayed when the Attendance Code is selected.

Adding/Removing Attendance

Individual attendance can be added or removed from the Attendance Detail window. If you wish to enter attendance for an entire group, refer to "Enter/Edit Attendance" on page 87.

Adding Attendance

1. Refer to "Displaying the Attendance Detail Window" on page 69 to display the appropriate Person Detail window.

2. Click the Add Attendance command button to open a new line for attendance entry.

3. Refer to "Attendance Detail Field Definitions" on page 71 to help you complete the Attendance Detail fields.

Removing Attendance

1. Refer to "Displaying the Attendance Detail Window" on page 69 to display the appropriate Person Detail window.

2. Select the attendance line you wish to remove and click the Remove Attendance command button. A warning dialog will display with the message "Remove Attendance for Group ...".

3. Click:

   Yes (ALT + Y) to remove the attendance entry.

   No (ALT + N) to abort the remove attendance process.

Groups

Groups Overview

Groups are the key element of *CMS Attendance for Windows*. Groups are lists of individuals who participate in specific activities where attendance records are kept. For example, the entire membership may be part of the worship service group, while other groups may be set up to track attendance in Sunday School classes, Bible study groups, or other events/activities. By using groups, the list of individuals in the group is defined and the attendance entry process is quicker. Additionally, group attendance records are summarized and presented graphically in the group summary window.

In this chapter we will cover:

- Viewing the Groups Windows

- Creating a New Group

- Defining Individuals for a Group

- Setting Preferences for Group Attendance Entry

- Deleting a Group

Viewing the Groups Windows

Displaying the Groups Summary Window
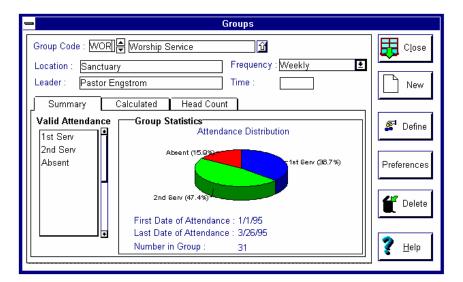
The Groups summary window displays a pie chart depicting attendance by attendance code for the current year. Valid Attendance codes are listed for each group. See "Selecting Valid Attendance" on page 85.

1. From the Process menu, choose Groups to display the Groups Summary window.

2. Use one of the following ways to select a group:

   Click the up or down arrows to select a specific group.

   Click on the Group Descriptor look-up button to display the Group dialog box. Select a group from the list.

The Groups Summary Window

Displaying the Groups Calculated Window

The Groups Calculated window displays the number of people with an attendance code for a given date of attendance. The information is derived directly from the entered attendance detail.
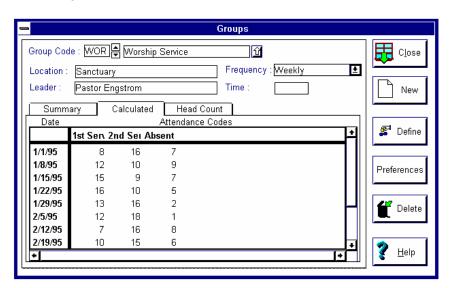
1. From the Process menu, choose Groups to display the Groups Summary window.

2. Use one of the following ways to select a group:

   Click the up or down arrows to select a specific group.

   Click on the Group Descriptor look-up button to display the Group dialog box. Select a group from the list.

3. From any groups window, click the Calculated tab.

The Groups Calculated Window

Displaying the Groups Head Count Window

Your church may want to record "head count" totals for a group. You may define column heading for the table with the preferences button. See "Creating Head Count Column Headings" on page 85.
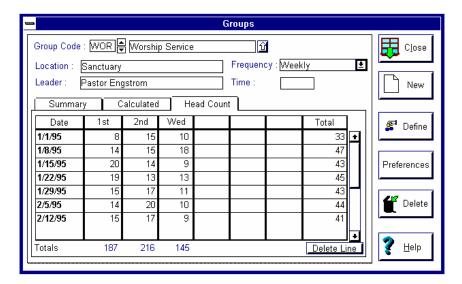
1. From the Process menu, choose Groups to display the Groups Summary window.

2. Select a group to display in one of the following ways:

   Click the up or down arrows to select a specific group.

   Click on the Group Descriptor look-up button to display the Group dialog box. Select a group from the list.

3. From any groups window, click the Head Count tab.

4. You may enter the head count totals directly on the table for a given date. Line and column totals are updated automatically. To delete a line, click on the line, then click the Delete Line button.

The Groups Head Count Window
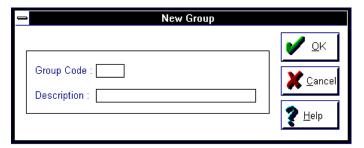
		Groups			
Group Code : WOR ⬍ Worship Service ⬆					Close
Location : Sanctuary			Frequency : Weekly ⬇		
Leader : Pastor Engstrom			Time :		New

Summary	Calculated	Head Count				
Date	1st	2nd	Wed			Total
1/1/95	8	15	10			33
1/8/95	14	15	18			47
1/15/95	20	14	9			43
1/22/95	19	13	13			45
1/29/95	15	17	11			43
2/5/95	14	20	10			44
2/12/95	15	17	9			41
Totals	187	216	145			Delete Line

Define

Preferences

Delete

Help

Groups Window Field Definitions

Don't forget that CMS provides online help on the window. Press the F1 function key.

Field Name	Field Length #/Characters	Description
Group Code	1 Group Code Look-up button	Click the up or down arrows to select a specific group, or click on the Group Descriptor look-up button to display the Group dialog box. When the Group dialog box is displayed, you can select a group from the list. You can add groups as needed. For instructions, see "Creating a New Group" on page 78
Location	40 alpha/numeric	Enter the location where the group meets.
Leader	40 alpha/numeric	Enter the name of the group leader.
Frequency	(Required) Frequency drop-down list button	Select a frequency from the list of pre-defined choices: weekly, monthly, daily or other.
Time	5 alpha/numeric	Enter the time of the group meeting.

Creating a New Group

1. At the main menu, select Groups from the Process menu.

2. At the Groups window, click the New command button. The New Group dialog box displays.

3. Enter a Group Code and Description for the group.

4. Click:

    OK (ALT + O) to create the new group and view the Groups window.

    Cancel (ALT + C) to return to the Groups window without adding a group.

5. Use the "Groups Window Field Definitions" chart on page 77 to complete the remaining fields on the Groups window.

6. Refer to "Defining Individuals for a Group" on page 79 to assemble a list of individuals for the group.

7. Refer to "Setting Preferences for Group Attendance Entry" on page 84 to assign a default attendance code and a right-click value for entering attendance.

Defining Individuals for a Group

There are two methods that you may use to define a list of individuals within a group:

- Define groups using *selections* when you can make a general statement (or statements) to describe a group. You can define groups by participation status, membership status, activities, classes, Sunday School status, grade levels or gender. For example, all persons with any member status except *transferred or moved* may comprise the Worship Service group. In an other case the first grade Sunday School class can be defined by choosing those assigned to the first grade *grade level*.

  This method is also used to maintain the group. Persons added to CMS who meet the group's selection criteria will be added to the group. See "Group Maintenance" on page 83.

- Use the *define by list* method to create a list of specific individuals within a group. You probably will use this method when it is impractical to describe a group by *selections* and you wish to simply select names from a complete list of persons.

To define individuals for a group:
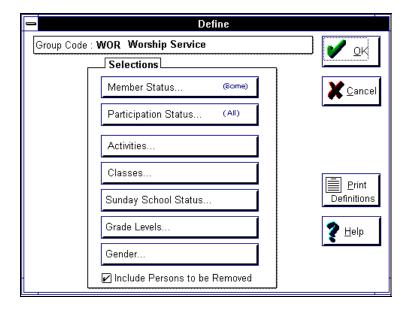
1. From the Process menu, choose Groups to display the Groups Summary window.

2. Select a group to define in one of the following ways:

   Click the up or down arrows to select a specific group.

   Click on the Group Descriptor look-up button to display the Group dialog box. Select a group from the list.

3. Click the Define command button. The Define dialog box displays.
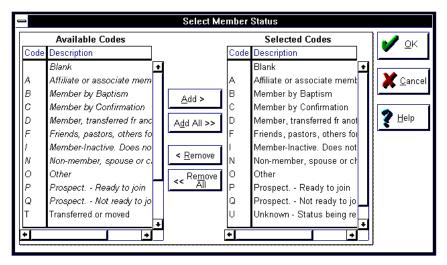
Defining Groups Using Selections

The *selection* method of group definition must be used exclusively. In other words, you cannot combine both the *selection* process and the *define by list* process to define a group. Once you have used the *selection* process, the Define By List button is removed from the Define dialog.

Notice that the word 'All' or 'Some' may display on a button. 'All' will display if all are selected. 'Some' will display if only some of the selection codes are selected. To see the selected codes, click on the selection button and view the list.

1. At the Define dialog, click on a selection button (Participation Status, Membership Status, Activities, Classes, Sunday School Status, Grade Levels or Gender).

2. The selection code dialog will display.

SAMPLE Selection Code Listing - Select Member Status

3. The dialog will list the Participation Status, Membership Status, Activities, Classes, Sunday School Status, Grade Levels or Gender codes. Codes which have not been selected will display in bold under "Available Codes." Codes which have been selected will display in bold under "Selected Codes." Use the buttons located between the columns to add and remove the codes. See "Selection Dialog Box Command Buttons" on page 19 for instructions on using the add and remove buttons.

4. Click:

    OK (ALT + O) to finalize selections.
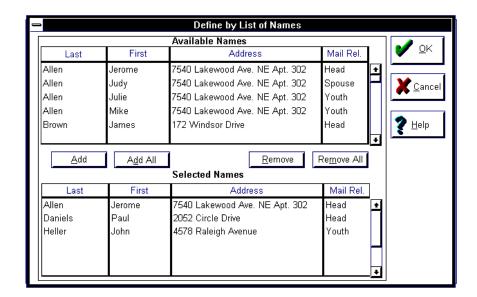
    Cancel (ALT + C) to return to the Define dialog without saving the selections.

5. Repeat from step 1 to define additional selection criteria.

Defining Groups Using Define by List

The *define by list* method of group definition must be used exclusively. In other words, you cannot combine both the *selection* process and the *define by list* process to define a group. Once you have used the *define by list* process, the selection buttons are replaced on the Define dialog with the statement "This group may be modified only with the Define By List button".

1. At the Define dialog, click the Define By List button. The Define by List of Names dialog will display.

---

2. Use the buttons located between the columns to add and remove names. See "Selection Dialog Box Command Buttons" on page 19 for instructions on using the add and remove buttons. To find a specific name, click in the last name column and then press a letter to jump to the first person with that letter in their last name. (*Esc* clears the name jump field.)

3. Click:

   OK (ALT + O) to finalize selections.

   Cancel (ALT + C) to return to the Define dialog without saving the selections.

Group Maintenance

Over the course of time, people in your congregation may come and go. The following procedure will automatically update a group list to reflect these changes. It is recommended you perform a backup of data before beginning.

To update a group's members:

1. From the Process menu, choose Groups to display the Groups Summary window.

2. Select a group to update in one of the following ways:

   Click the up or down arrows to select a specific group.

   Click on the Group Descriptor look-up button to display the Group dialog box. Select a group from the list.

3. Click Define to display the Define dialog box.

4. Click <u>O</u>K *(ALT + O).*

CMS will add and remove people (along with their attendance information) as necessary to update the group. If CMS removes someone from the group, it will display a message to tell you.

You may use the Person Summary window to add and remove individuals from groups. See "Adding a Person to a Group" on page 57 or "Removing a Person from a Group" on page 57.

Setting Preferences for Group Attendance Entry

To speed the attendance entry process you can choose preferences for the default attendance code and the attendance code that is entered with a right mouse click.

1. From the Process menu, choose Groups to display the Groups Summary window.

2. Select a group for setting preferences in one of the following ways:

   Click the up or down arrows to select a specific group.

   Click on the Group Descriptor look-up button to display the Group dialog box. Select a group from the list.

3. Click the Preferences command button. The Preferences dialog box displays. In this example, the Enter/Edit Attendance window for the *Bible Study Group 1* group will operate in the following way: On a new attendance date, CMS will initially assign the *absent* code to everyone in the group. A right click in the Attendance Code field will insert the code *present* for that person.

Setting Attendance Entry Defaults

1. The default Attendance code will be assigned at the time of attendance entry to all people in the group.

   Click the Default Attend. look-up button. Select a default attendance code from the Valid Attendance dialog box.

NOTE: Only attendance codes selected as valid attendance codes for the group may be selected.

---

2. The right mouse click is used during attendance entry. CMS will insert the code you select here when you right click the Attendance Code field on Enter/Edit Attendance window.

   Click the Right Mouse Click look-up button. Select a default attendance code from the Valid Attendance dialog box.

Selecting Valid Attendance Codes

◆ Click the Valid Attendance command button to select valid attendance codes for the group. Choose the appropriate codes from the Valid Attendance Selection dialog box. See "Selection Dialog Box Command Buttons" on page 19 for instructions on using the add and remove buttons. Choose:

   OK (ALT + O) to finalize selections.

   Cancel (ALT + C) to return to the Preferences dialog without saving the selections.

Creating Head Count Column Headings

1. Click the Head Count Table Headings command button to create the headings for the Head Count Table on the Groups Head Count window. Enter headings up to 10 characters in length in the boxes provided. Choose:

   OK to finalize selections.

   Cancel (ALT + C) to return to the Preferences dialog without saving the selections.

2. At the Preferences dialog box, choose:

   OK to finalize selections.

   Cancel (ALT + C) to return to the Preferences dialog without saving the selections.

Deleting a Group

If you wish to retain the group's attendance, use Move Prior Attendance to move the attendance to another group. See "Move Prior Attendance" on page 97.

1. From the Process menu, choose Groups to display the Groups Summary window.

2. Select a group to delete in one of the following ways:

   Click the up or down arrows to select a specific group.

   Click on the Group Descriptor look-up button to display the Group dialog box. Select a group from the list.

3. Click the Delete command button. Choose Yes at the Delete Group? confirmation dialog.

NOTE: Deletion of a group removes all associated attendance for that group.

Enter/Edit Attendance

Enter/Edit Attendance Overview

Use Enter/Edit Attendance to enter or edit attendance for an entire group at one time. You can also enter or edit attendance for an individual person from the Person-Attendance Detail window. See "Person - Attendance Maintenance" on page 69 for more information.

To speed the attendance entry process you can choose preferences for the default attendance code and the attendance code that is entered with a right mouse click. See "Setting Preferences for Group Attendance Entry" on page 84 for more information.
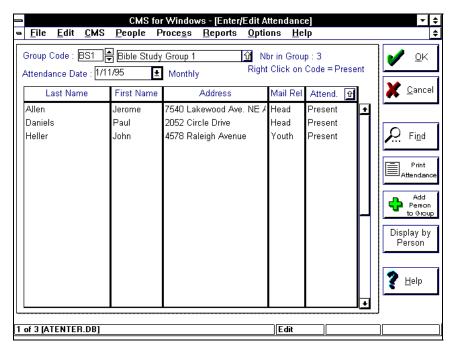
In this chapter, we will cover:

- Viewing the Enter/Edit Attendance Window

- Entering Attendance

- Editing Attendance

- Move Prior Attendance

- Delete Prior Attendance

Viewing the Enter/Edit Attendance Window

◆ From the Process menu, choose Enter/Edit Attendance to display the Enter/Edit Attendance window.

The Enter/Edit Attendance Window

```
┌─────────────────────────────────────────────────────────────────────┐
│  ▬                CMS for Windows - [Enter/Edit Attendance]    ▼ ▲   │
│  ▬   File  Edit  CMS  People  Process  Reports  Options  Help    ▲   │
│  ┌──────────────────────────────────────────────────┐  ┌──────────┐ │
│  Group Code : │BS1│ ▲▼ Bible Study Group 1      ⛬  Nbr in Group : 3 │
│                                        Right Click on Code = Present │
│  Attendance Date : │1/11/95│ ▼ Monthly                               │
│  ┌─────────────┬────────────┬──────────────────┬─────────┬────────┐ │
│  │ Last Name   │ First Name │     Address      │Mail Rel │Attend. ⛬│ │       ✔  OK      │
│  ├─────────────┼────────────┼──────────────────┼─────────┼────────┤ │
│  │ Allen       │ Jerome     │7540 Lakewood Ave. NE │Head │Present │ │
│  │ Daniels     │ Paul       │2052 Circle Drive │ Head    │Present │ │       ✘  Cancel  │
│  │ Heller      │ John       │4578 Raleigh Avenue│ Youth  │Present │ │
│  │             │            │                  │         │        │ │
│  │             │            │                  │         │        │ │       🔍  Find   │
│  │             │            │                  │         │        │ │
│  │             │            │                  │         │        │ │       📄 Print   │
│  │             │            │                  │         │        │ │       Attendance │
│  │             │            │                  │         │        │ │
│  │             │            │                  │         │        │ │       ➕ Add     │
│  │             │            │                  │         │        │ │       Person     │
│  │             │            │                  │         │        │ │       to Group   │
│  │             │            │                  │         │        │ │
│  │             │            │                  │         │        │ │    Display by    │
│  │             │            │                  │         │        │ │     Person       │
│  │             │            │                  │         │        │ │
│  │             │            │                  │         │        │ │       ❓  Help   │
│  └─────────────┴────────────┴──────────────────┴─────────┴────────┘ │
│  1 of 3 [ATENTER.DB]                          │Edit │              │
└─────────────────────────────────────────────────────────────────────┘
```

Entering Attendance

1. Refer to "Viewing the Enter/Edit Attendance Window" above to access the Enter/Edit Attendance window.

2. Select a group for attendance entry in one of the following ways:

   Click the up or down arrows to select a specific group.

   Click on the Group Descriptor look-up button to display the Group dialog box. Select a group from the list.

3. Enter the date for attendance entry in the Attendance Date field or right click on the attendance date field to display a visual calendar to select a

date. Press the Enter key to display the names of the group members. CMS will insert the default attendance code for the group to all members of the group. See "Setting Preferences for Group Attendance Entry" on page 84.

4. Select a person in one of the following ways:

Click your mouse cursor on the attendance code of the person. Use the scroll bars as necessary to view the appropriate person.

Click the Find button to find a specific person.

Click in the Last Name column and press a letter to jump to the first person with a last name that begins with that letter. Subsequent letters jump to the first person who has that combination of letters. Press *ESC* to cancel.

Press the Up or Down Arrow keys to move to the appropriate person. The Left Arrow key will move the cursor to the last name field if you wish to press a letter to jump to the first person with a last name that begins with that letter.

3. Enter an attendance code for the person in one of the following ways:

Click the right mouse to assign the default attendance code indicated at the top of the window, (additional right clicks will step through the group's valid attendance codes). See "Setting Preferences for Group Attendance Entry" on page 84 for more information.

Press the "+" key on the numeric key pad button to scroll through the available attendance codes.

Click the Attend. look up button and select an Attendance Code from the Valid Attendance dialog box.

NOTE: For keyboard entry (without a mouse) press the Up and Down Arrow keys with your thumb to select a name. Use your ring finger on the + key to select the appropriate attendance code.

---

6. Repeat steps 4 and 5 to enter all attendance information, choose:

OK to finalize attendance entry.

<u>C</u>*ancel (ALT + C)* to return to the main menu without saving the entries.

Finding a Specific Person

If the group list is long, you can use the Find function to find a specific person in the group list.

1. Click the Find command button to display the Find dialog box.

2. Enter the first name and/or last name of the person you wish to find in the fields provided.

3. Choose:

   Search to find the person entered.

   Cancel (ALT + C) to exit the search function.

Print the Attendance Report

◆ Click the Print Attendance command button to generate an Entered/Edited Attendance report for the group and date selected.

Display the Group by Household or Person

You can choose to display the list of group members organized by Household or by Person.

◆ Click the Display by Household command button to organize the group list by household.

   or,
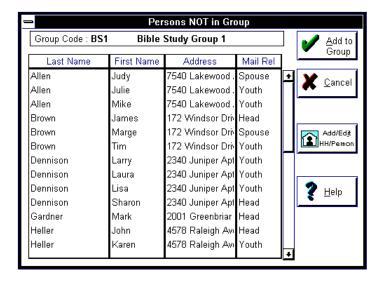
◆ Click the Display by Person command button to organize the group list by person name.

Adding a Person to the Group

If you wish to enter attendance for a person who is not currently a member of a group, you can add the person to the group from the Enter/Edit Attendance window.

1. Click the Add Person to Group command button to display the Persons NOT in Group window.

2. All persons in the CMS database, but not in the group are listed in this window. Use the scroll bars as necessary to locate the person you wish to add. If the person is not currently in the CMS database see "To Add a Household/Person from the Persons NOT in Group Window" on page 92.

3. Select the person you wish to add, choose:

    *A*dd to Group *(ALT + A)* to add the person.

    *C*ancel *(ALT + C)* to exit the add person to group function.

To Add a Household/Person from the Persons NOT in Group Window

1. From the Persons NOT in Group window, click the Add/Edit HH/Person (ALT + I) command button to display the Attendance Household window.

2. When the Attendance Household window displays, there may be household data already entered. If it is not the correct household, click the New Household (ALT + U) command button to clear the fields.

3. Enter the household information. Refer to the "Household Window Field Definition Chart" on page 42 for field definitions.

4. Click the Add command button to position the cursor on the first available line for adding a person to the household. At least one person, the head of household, must be added. Refer to the "Person Field Definition Chart" on page 57 for field definitions.

5. Click:

   Select Person (ALT + L) after selecting a person. Entries on the Attendance Household window will be saved. The Enter/Edit Attendance window will return with the selected person's data displayed.

   Cancel (ALT + C) to save changes made to the data fields without selecting a person. The Enter/Edit Attendance window will return.

   Find (ALT + N) to access the Find dialog. Refer to "Finding Existing Households" on page 46 for instructions on finding a household.

   Undo Changes (ALT + Backspace) to undo any changes made to the data fields.

   New Household (ALT + U) to save the current data and display a blank Attendance Household window to add a new household.

Enter/Edit Attendance Data Field Definitions

Don't forget that CMS provides online help on the window. Press the F1 function key.

Field Name	Field Length #/Characters	Description
Group Code	`1` [up/down arrows] [icon] Group Code Look-up button	Click the up or down arrows to select a specific group, or click on the Group Descriptor look-up button to display the Group dialog box. When the Group dialog box is displayed, you can select a group from the list. Add groups as needed. For instructions, see "Creating a New Group" on page 78
Attendance Date	[icon] Attendance Date drop down list button	Enter an attendance date or select an attendance date from the list.
First Name	(Display only) up to 20 alpha/numeric	The person's first name.
Last Name	(Display only) up to 38 alpha/numeric	The person's last name.
Address	(Display only) Up to 30 alpha/numeric	The residence and street or route number.
Mail Rel	(Display only)	The Mailing Relationship: Head, Spouse, Youth, etc.

Field Name	Field Length #/Characters	Description
Attend.	⬆️ Attendance Code Look-up button	Right click your mouse to enter a preset attendance code. Additional right clicks will step through the group's valid attendance codes. The "+" key on the numeric keypad performs the same function as the right click. You may also click on the Attendance Code or look-up button to display the Attendance Code dialog box. When the Attendance Code dialog box is displayed, you can select a group from the list.

Editing Attendance

1. Refer to "Viewing the Enter/Edit Attendance Window" on page 88 to access the Enter/Edit Attendance window.

2. Select a group for attendance entry in one of the following ways:

    Click the up or down arrows to select a specific group.

    Click on the Group Descriptor look-up button to display the Group dialog box. Select a group from the list.

3. Click the drop down arrow in the Attendance Date group box to display the dates available for editing. Select an Attendance date.

4. Select a person in one of the following ways:

    Click your mouse cursor on the attendance code of the person. Use the scroll bars as necessary to view the appropriate person.

    Click the Find button to find a specific person.

    Click in the Last Name column and press a letter to jump to the first person with a last name that begins with that letter. Subsequent letters jump to the first person who has that combination of letters. Press *ESC* to cancel.

5. Enter an attendance code for the person in one of the following ways:

    Click the right mouse or *press the "+" key* on the numeric key pad button to assign the default attendance code indicated at the top of the window. See "Setting Preferences for Group Attendance Entry" on page 84 for more information.

    Click the Attend. look up button and select an Attendance Code from the Valid Attendance dialog box.

6. Repeat step 4 for attendance code being edited, choose:

    OK to finalize attendance editing.

    Cancel (ALT + C) to return to the main menu without saving the entries.

Move Prior Attendance
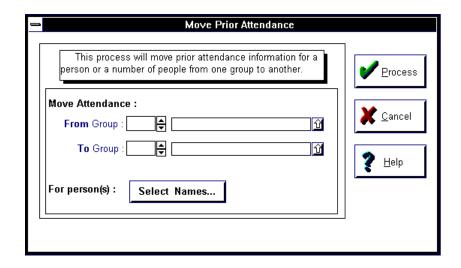
The Move Prior Attendance process will move prior attendance information for a person or persons from one group to another. For example, you might use this process to move student attendance records from one grade level group to another.

When you move prior attendance from one group to another:

- All attendance detail for the selected persons is moved out of the "From" group and into the "To" group.

- The selected person is also moved out of the "From" group and into the "To" group.

- If the person is currently in the "To" group with existing attendance detail, detail with the same attendance date is NOT moved but will be removed from the "From" Group. Attendance detail with different dates will be added to the "To" group.

- The group definitions are not changed for either the "From" group or the "To" group.

To move prior attendance:

1. From the Process menu choose Move Prior Attendance. The Backup Confirmation dialog will display.

2. Backup your records before continuing. If you do not have a current backup of data, click Backup to begin the backup procedures. Refer to "Backup" on page 157 for data backup instructions. If you already have a current backup, click Continue to display the Move Prior Attendance dialog.

```
┌──────────────────────────────────────────────────────────────┐
│ ▭                     Move Prior Attendance                    │
├──────────────────────────────────────────────────────────────┤
│  ┌────────────────────────────────────────────┐              │
│  │ This process will move prior attendance      │   ✔ Process │
│  │ information for a                            │              │
│  │ person or a number of people from one group  │              │
│  │ to another.                                  │              │
│  └────────────────────────────────────────────┘   ✖ Cancel   │
│  ┌────────────────────────────────────────────┐              │
│  │ Move Attendance :                           │              │
│  │   From Group : [  ][▲▼][              ][⇧]  │   ? Help     │
│  │     To Group : [  ][▲▼][              ][⇧]  │              │
│  │                                             │              │
│  │  For person(s) :   [ Select  Names... ]     │              │
│  └────────────────────────────────────────────┘              │
└──────────────────────────────────────────────────────────────┘
```

3. Select a 'From Group' and a 'To Group' in one of the following ways:

    Click the up or down arrows to select a specific group.

    Click on the Group Descriptor look-up button to display the Group dialog box. Select a group from the list.

    Type a group code in the Group Code field.

4. Select a person or persons by clicking the Select Names button.

5. The Select Names dialog displays a listing of names. Names which have not been selected will display in bold under "Available Names." Names which have been selected will display in bold under "Selected Names." Use the buttons located between the columns to add and remove the names. See "Selection Dialog Box Command Buttons" on page 19 for instructions on using the add and remove buttons. To find a specific name, click in the last name column and then press a letter to jump to the first person with that letter in their last name. (*Esc* clears the name jump field.)

6. Click:

    OK (ALT + O) to finalize selections and return to the Move Prior Attendance dialog.

    Cancel (ALT + C) to return to the Move Prior Attendance dialog without saving the selections.

7. Click:
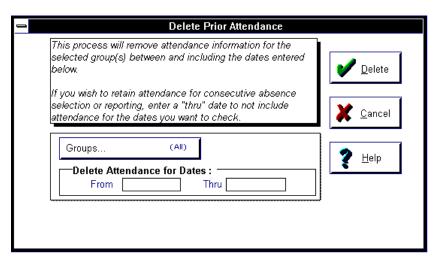
    Process (ALT + D) to move the attendance records for the persons
    selected.

    Cancel (ALT + C) to return to the main menu without moving
    attendance records.

Delete Prior Attendance

This process will remove attendance information for the selected group(s)
between and including the dates entered. If you wish to retain attendance for
consecutive absence selection or reporting, enter a 'thru' date to not include
attendance for the dates you want to check.

1. From the Process menu choose Delete Prior Attendance. The Backup
    Confirmation dialog will display.

2. Backup your records before continuing. If you do not have a current
    backup of data, click Backup to begin the backup procedures. Refer to
    "Backup" on page 157 for data backup instructions. If you already
    have a current backup, click Continue to display the Delete Prior
    Attendance dialog.

3. At the Delete Prior Attendance dialog, click on the Groups selection
    button. Notice that the word 'All' or 'Some' may display on the button.

'All' will display if all groups are selected. 'Some' will display if only some of the groups are selected.

4. The Select Group code dialog displays a listing of groups codes. Codes which have not been selected will display in bold under "Available Codes." Codes which have been selected will display in bold under "Selected Codes." Use the buttons located between the columns to add and remove the codes. See "Selection Dialog Box Command Buttons" on page 19 for instructions on using the add and remove buttons.

5. Click:

   OK (ALT + O) to finalize selections.

   Cancel (ALT + C) to return to the Delete Prior Attendance dialog without saving the selections.

6. Click on the 'From' field and enter up to a 6-digit numeric date. Slashes will be inserted after each 2 digits, or when the spacebar is pressed. (For example, entry of 122478 will be interpreted by CMS as 12/24/78. Entry of 12478 will not be correctly interpreted as 12/4/78 without depressing the spacebar or typing a "/" after the 4.)

7. Click on the 'Thru' field and enter up to a 6-digit numeric date.

8. Click:

   Delete (ALT + D) to delete the attendance records for the groups and the dates selected.

   Cancel (ALT + C) to return to the main menu without deleting attendance records.

Labels

Labels Overview

The label function in *CMS Attendance* prints name tags, envelopes, or mailing labels. You can print a label for an individual person or for a household using the 'Quick Label' feature, or you can print multiple labels using the Labels selection on the Reports menu. From the Reports menu, labels can be printed for multiple households or persons based on the selected name range, membership, participation status, or group. In addition, labels can be sent to individuals based on consecutive absences within selected dates.

In this chapter, we will cover:

- Printing a Quick Label

- Printing Labels for Mailings
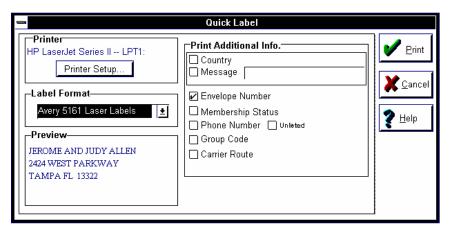
Printing a Quick Label

Quick Label prints a label for one person or household record. Quick Labels are available from the Mailing Label button or the Reports menu when the household or person windows are active.

Be sure your printer is on-line and ready.

1. Put the label form or envelope in the printer paper feeder.

2. From the Household or Person windows, display the household or person.

3. Click the Mailing Label button on the speed bar. The Quick Label dialog displays.

4. Select the Print Options. Refer to "Print to:" on page 116.

5. Click the Label Format drop-down list button to display the label format choices. (You can choose from several pre-formatted label selections as well as a #10 envelope. If the format you need is not available, contact *Church Management Solutions* for help.) Click on the appropriate format.

6. Select the appropriate print options listed under "Print Additional Info." Refer to "Print Additional Information" on page 104.

7. Click:

    Print (ALT + P) to print the label

    Cancel (ALT + C) to exit the Quick Label dialog box.
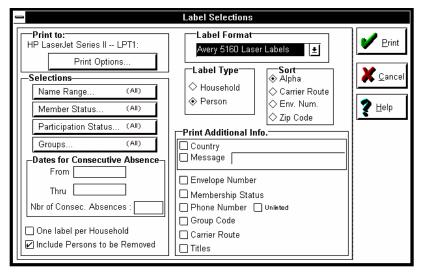
Printing Labels for Mailings

Use the Labels selection from the Reports menu to print envelopes, name tags, or mailing labels for multiple households or persons. The selection criteria available prints the labels based on selected name range, Membership Status, Participation Status, group assignment or consecutive absence periods.

Be sure your printer is on-line and ready.

1. Put the label form or envelope in the printer paper feeder.

2. Choose Labels from the Reports menu. The Label Selections dialog displays.

3. Select the Print Options. Refer to "Print to:" on page 116.

4. Make the appropriate Name Range, Member Status, Participation Status and group selections. Refer to "Selections" on page 119.

5. If you wish, you can print labels for individuals based on consecutive absences during a specified date range or by a number of consecutive absences. Enter *from* and *thru* dates for consecutive absences. Additionally, you can enter the number of consecutive absences. See "Consecutive" on page 113 for more information.

6. Click on the Include Persons to be Removed check box to include persons marked for removal on the report. A check mark will display. To remove the check, click the check box again. (This function is applicable only if you are also using *CMS Membership for Windows*[TM].)

7. Click the Label Format drop-down list button to display the label format choices. (You can choose from several pre-formatted label selections as well as a #10 envelope. If the format you need is not available, contact *Church Management Solutions* for help.) Click on the appropriate format.

8. Click the Household or Person option button to select a label type.

9. Click on the appropriate Sort option. Labels can be sorted and printed in Alpha order (last name, first name), Carrier Route, Envelope number, or Zip Code.

10. Select the Print Additional Information print options. Refer to "Print Additional Information" below.

11. Click:

   Print (ALT + P) to print the label

   Cancel (ALT + C) to exit the Quick Label dialog box.

Print Additional Information

```
┌─Print Additional Info.──────────────┐
│ ☐ Country                           │
│ ☐ Message  ┌─────────────────────┐  │
│            │ CARRIER ROUTE SORT  │  │
│            └─────────────────────┘  │
│ ☐ Envelope Number                   │
│ ☐ Membership Status                 │
│ ☐ Phone Number  ☐ Unlisted          │
│ ☐ Group Code                        │
│ ☐ Carrier Route                     │
│ ☐ Titles                            │
└─────────────────────────────────────┘
```

Print Additional Information prints the selected additional information on the labels.

◆ To select a print option, click on the check box. A check mark will display when the option is selected. Click again to remove the check mark from the option button.

Country	Click on the Country option button to print the country on the bottom of the label.
	Note, due to size limits, you can print either country or message, not both.
Message	Click on the Message option button to print the message on the top of the label.
	Click inside of the message field and type the message. Since the number of characters which can print on the label varies *(up to 25 characters may be entered)*, print a label for one name as a test.
	If you are printing a Carrier Route on labels, you must also print the message "CARRIER ROUTE PRESORT" or "CAR-RT SORT."
	Note, due to size limits, you can print either country or message, not both.

Envelope Number	Click on the Envelope Number option button to print the envelope number on the top of the label.
Membership Status	Click on the Membership Status option button to print the membership status on the top of the label. For more information about Membership Status, see "Membership Status" on page 36.
Phone Number	Click on the Phone Number option button to print the household/person phone number on the top of the label.
Unlisted	Click on the Unlisted option button to print unlisted phone numbers on the top of the label.
Group Code	Click on the Group Code option button to print the group code on the top of the label.
Carrier Route	Click on the Carrier Route option button to print the Carrier Route on the top of the label.
Titles	Click on the Titles option button to print the title selected (from the Household or Person Summary window) on the labels.

Attendance Standard Reports

Attendance Standard Reports Overview

CMS Attendance provides a variety of standard reports for tracking attendance. Each report offers selections that enable you to customize the report to your needs.

This chapter will cover the Attendance Detail, Attendance Pattern, Consecutive Absences, First Time Attendees, Group Attendance Summary, Group Checklist, Group Directory, Group List and Definition, Group Meeting Dates, Group Head Counts, Periodic Attendance Summary, and Number of Times of Attendance Reports. Printing Visitor Request Cards is also covered in this chapter.

(Note that Contributor Labels, Statements, Summary Graphs, and User Defined Reports are covered in other chapters.)

In this chapter, we will cover:

- Standard Reports

- Running a Standard Report

- Standard Report Options

Standard Reports

The following reports are standard with *CMS Attendance for Windows™*. Each are listed under the Reports menu.

Attendance Detail	Reports present and absent dates, as well as summary times present or absent for all persons by group.
	Selections: Name Range, Member Status, Participation Status, Groups and Attendance Dates for the Report.
	For a report sample, see "Attendance Detail Sample" on page 126.
Attendance Pattern	Charts attendance patterns for each individual within a group. Summarizes attendance for the selected period.
	Selections: Name Range, Member Status, Participation Status, Groups and Attendance Dates for the Report, Sort by Person Name, Household or Household Group Code, Number of Consecutive Absences and Print Preferences for present and absent.
	For a report sample, "Attendance Pattern Sample" on page 127.
Consecutive Absences	Prints a listing of persons absent a given number of times over a range of dates.
	Selections: Name Range, Member Status, Participation Status, Groups and Attendance Dates for the Report, Sort by Person Name, Household or Household Group Code, and Number of Consecutive Absences.
	For a report sample, see "Consecutive Absences Sample" on page 128.
First Time Attendees	Prints first time attendees for the date selected.
	Selections: Name Range, Member Status, Participation Status, Groups and Attendance date.
	For a report sample, see "First Time Attendees Sample" on page 129.

Group Attendance Summary	Prints attendance summary by attendance code.
	Selections: Member Status, Participation Status, Groups and Attendance Dates for the Report.
	For a report sample, see "Group Attendance Summary Sample" on page 130.
Group Checklist	Prints an attendance checklist.
	Selections: Name Range, Member Status, Participation Status, and Groups.
	For a report sample, see "Group Checklist Sample" on page 131.
Group Directory	Prints a directory of individuals by group selected.
	Selections: Name Range, Member Status, Participation Status, and Groups.
	For a report sample, see "Group Directory Sample" on page 132.
Group List and Definition	Prints a list of Groups and their definitions.
	Selections: Groups.
	For a report sample, see "Group List and Definition Sample" on page 133.
Group Meeting Dates	Prints a list of meeting dates for each group selected.
	Selections: Groups.
	For a report sample, see "Group Meeting Dates Sample" on page 134.
Group Head Counts	Prints a list of head counts for each group selected.
	Selections: Groups.
	For a report sample, see "Group Head Counts Sample" on page 135.
Periodic Attendance Summary	Prints summary of attendance by attendance status for the groups selected and the dates specified.
	Selections: Groups, attendance dates, period to be summarized: weekly, monthly, quarterly, or yearly.
	For a report sample, see "Periodic Attendance Summary Sample" on page 136.

Number of Times of Attendance	Prints a list of individuals who have attended per "Number of Times" specified over a range of dates.
	Selections: Name Range, Member Status, Participation Status, Groups, Attendance Dates for the Report, and Number of Times attended.
	For a report sample, see "Number of Times of Attendance Sample" on page 137.
Visitor Request Cards	Prints 3 x 5 laser cards for Visitor Request Information.
	For a report sample, see "Visitor Request Cards Sample" on page 138.
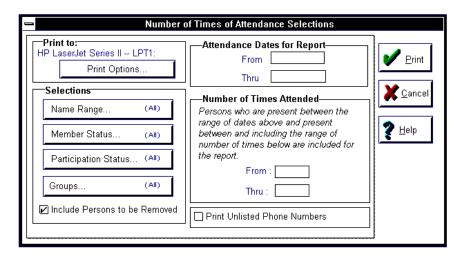
Running a Standard Report

In most cases, you will get a selection dialog after you choose a report from the Reports menu. This dialog gives you options relating to the report you have chosen. Each of these options will be described in this section. They are listed in alphabetical order.

SAMPLE Selection Dialog - Number of Times of Attendance

Be sure your printer is on-line and ready.

1. Choose the report from the Reports menu. Once the report is chosen, the report dialog will display.

2. The report dialog which displays depends on the report selected. Refer to the following for specific instructions on each report option.

Attendance Date or Attendance Dates for Report:	Refer to "Attendance Date or Attendance Dates for Report" on page 113.
Consecutive Absences:	Refer to "Consecutive Absences" on page 113. Attendance Pattern and Consecutive Absences reports, attendance labels, and merge file only.
Number of Times Attended:	Refer to "Number of Times Attended" on page 114. Number of Times Attended report only.
Print Preferences or Print Additional Information:	Refer to "Print Preferences or Print Additional Information" on page 115.
Print To:	Refer to "Print to:" on page 116.
Selections:	Refer to "Selections" on page 119. Selection options can include Name Range, Member Status, Participation Status, Funds, Batch, Date Range, and Include Persons to be Removed.
Sort:	Refer to "Sort by Option" on page 123.

3.   Click:

   Print (ALT + P) on the Selection dialog to run your report.

   Cancel (ALT + C) to exit the Selection dialog without running the report.

Standard Report Options

**Attendance Date or
Attendance Dates
for Report**

The Attendance Date for Report option is found on several reports.

1. Click on the 'From' field and enter up to a 6-digit numeric date.
    Slashes will be inserted after each 2 digits, or when the spacebar is
    pressed. (For example, entry of 122478 will be interpreted by CMS as
    12/24/78. Entry of 12478 will not be correctly interpreted as 12/4/78
    without depressing the spacebar or typing a "/" after the 4, or entering
    120478.)

2. Click on the 'Thru' field and enter up to a 6-digit numeric date.

The Attendance Date option is found on the First Time Attendees report.

◆   Click on the 'First time attendees on' drop-down list box and select a
    date from the dates listed, or and enter up to a 6-digit numeric date in
    the text box.

**Consecutive
Absences**

The Consecutive Absences option is found on the Consecutive Absences and
Attendance Pattern reports, Labels and Merge File.

◆ Enter the number of absences counted backwards from the Attendance 'Thru' Date in the box provided. CMS will print those people who were absent the specified number of times <u>backwards</u> from the date entered as the 'Thru' date. For example, if the dates from 1/7/96 thru 1/28/96 and the number of consecutive absences of 3 is entered, CMS will print those people absent on 1/14/96, 1/21/96 and 1/28/96 for a weekly group.

Number of Times Attended

Number of Times Attended

Persons who are present between the range of dates above and present between and including the range of number of times below are included for the report.

From : [   ]

Thru : [   ]

The Number of Times Attended option is found only on the Number of Times Attended report.

◆ Enter the range of attendance times for the report in the 'From' and 'Thru' boxes provided.

Summarize Period Selection

Summarize

◉ Weekly

◇ Monthly

◇ Quarterly

◇ Yearly

The Summarize option is found on the Periodic Attendance Summary report.
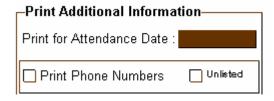
◆ Click the Weekly, Monthly, Quarterly, or Yearly option button to determine the period of time to summarize counts.

**Print Preferences or
Print Additional
Information**

┌Print Preferences────────
◇ + for Present, . for Absent
◇ First letter of attendance
◈ P for Present, A for Absent

☐ Print Unlisted Phone Numbers

The Print Preferences option is found on the Attendance Pattern Report.

1. Click on the appropriate Print Preference option button to select the character that will graphically represent the attendance code on the report.

2. Click the Print Unlisted Phone Numbers check box for unlisted numbers to appear on the report. Click the check box again to remove the check and delete unlisted numbers from the report.

┌Print Additional Information────────
Print for Attendance Date : ▐▬▬▬▬▬▬▬▌

☐ Print Phone Numbers   ☐ Unlisted

The Print Additional Information option box appears on the Group Checklist report.

1. Enter the date for the Attendance Checklist in the box provided. Enter up to a 6-digit numeric date. Slashes will be inserted after each 2 digits, or when the spacebar is pressed. (For example, entry of 122478 will be interpreted by CMS as 12/24/78. Entry of 12478 will not be correctly interpreted as 12/4/78 without depressing the spacebar or typing a "/" after the 4, or entering 120478.)

2. Click on the appropriate checkbox to print phone numbers or *unlisted* for unlisted phone numbers

Print to:

```
┌─Print to:──────────────────┐
│ HP LaserJet Series II -- LPT1:    │
│  ┌──────────────────────┐  │
│  │      Print Options...        │  │
│  └──────────────────────┘  │
└────────────────────────────┘
```
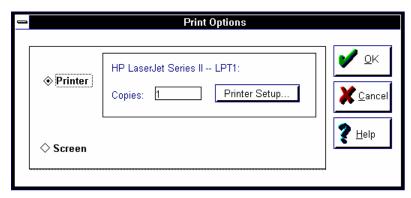
You will see a "Print to" field on all selection dialogs. Your current printer choice will be displayed. *CMS Attendance* offers you two print options: printing to a selected printer (the default choice), or displaying the report on the screen.

Printing to the Printer

1. At the report selection dialog, click the Print Options button. The Print Options dialog will display.

```
┌────────────────────────────────────────────────┐
│ ▬                    Print Options                       │
│ ┌──────────────────────────────────┐  ┌──────────┐ │
│ │         HP LaserJet Series II -- LPT1:    │  │ ✔  OK    │ │
│ │ ◈ Printer                                     │  └──────────┘ │
│ │          Copies:  1    [Printer Setup...] │  ┌──────────┐ │
│ │                                               │  │ ✖ Cancel │ │
│ │                                               │  └──────────┘ │
│ │ ◇ Screen                                     │  ┌──────────┐ │
│ │                                               │  │ ❓ Help   │ │
│ └──────────────────────────────────┘  └──────────┘ │
└────────────────────────────────────────────────┘
```

2. The Printer option button is the default. Also note that the current printer selection is displayed.

   To install a printer or select a different default printer, click the Printer Setup button to display the "Printers" dialog from the Windows™ Control Panel. (The Windows™ Control Panel "Printers" dialog is also accessible from the Windows™ Program Manager.) For more information on installing and configuring a printer, see your Windows™ manual.

3. To change the number of copies, click in the Copies field and type in the number of copies to print.

4. Click:

   OK (ALT + O) to finalize your choice.

   Cancel (ALT + C) to return to the report selection dialog without saving the changes.

5. At the report selection dialog, click:

   Print (ALT + P) to print the report.

   Cancel (ALT + C) to cancel the report request.

Displaying the Report on the Screen

1. At the report selection dialog, click the Print Options button. The Print Options dialog will display.

2. Click on the Screen option button.

3. Click:

   OK (ALT + O) to finalize your choice.
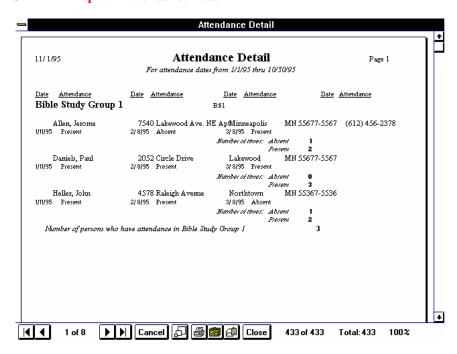
   Cancel (ALT + C) to return to the report selection dialog without saving the changes.

4. At the report selection dialog, click:
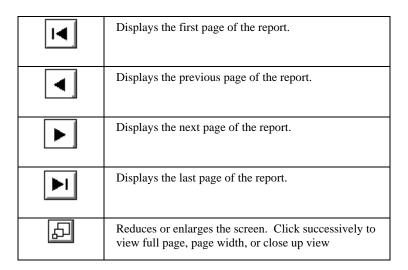
   Print (ALT + P) to print.

   Cancel (ALT + C) to cancel the report request.

```
                          Attendance Detail

11/1/95                   Attendance Detail                      Page 1
                    For attendance dates from 1/1/95 thru 10/30/95


Date    Attendance        Date   Attendance        Date   Attendance          Date  Attendance
Bible Study Group 1                            BS1

      Allen, Jerome           7540 Lakewood Ave. NE AptMinneapolis    MN 55677-5567   (612) 456-2378
1/11/95   Present        2/8/95   Absent            3/8/95   Present
                                                Number of times: Absent     1
                                                                 Present     2
      Daniels, Paul           2052 Circle Drive        Lakewood       MN 55677-5567
1/11/95   Present        2/8/95   Present            3/8/95   Present
                                                Number of times: Absent     0
                                                                 Present     3
      Heller, John            4578 Raleigh Avenue      Northtown      MN 55367-5536
1/11/95   Present        2/8/95   Present            3/8/95   Absent
                                                Number of times: Absent     1
                                                                 Present     2
      Number of persons who have attendance in Bible Study Group 1          3
```

⏮	◀	1 of 8	▶	▶|	Cancel	🗗 🖨 📷 📑	Close	433 of 433 Total: 433 100%

5. When the report displays, use the tools on the speed bar to scroll through the report, view the entire page, or to print the report.

⏮	Displays the first page of the report.
◀	Displays the previous page of the report.
▶	Displays the next page of the report.
▶|	Displays the last page of the report.
🗗	Reduces or enlarges the screen. Click successively to view full page, page width, or close up view

	Exports the report to a file.
	Exports the report to a file.
	Click on the printer icon to print the report to the printer.
Close	Closes the report and return to *CMS Attendance*.

6. Click on the Close command button to close the report and return to *CMS Attendance*.

Selections

Not all reports offer the same selections. The selection buttons are used to define the report by name range, member status, participation status, and groups. (Member and participation codes are assigned to persons in the Person Summary window.) The Include Persons to be Removed function also prints persons marked for removal. (This is applicable only if you are also using *CMS Membership for Windows*[TM.].)
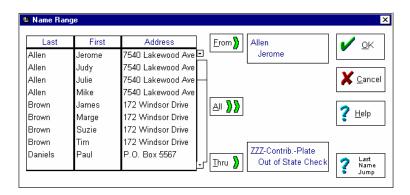
Name Range Selections

The Name Range option is available on some reports. With it, you can request a single name, a range of names, or all names to print on the report.

1. At the report selection dialog, click the Name Range button to display the Name Range dialog.

SAMPLE Name Range Dialog

2. The dialog lists all names sorted in alphabetical order. Use the From, Thru, and All buttons to select the names.

To select a range of names, use the mouse to select the first name to print, then click the From button. Use the scroll bar to view all of the names on the list. Once you have selected the first (from) name, use the mouse to select the last name by clicking the name then the Thru button. The from and thru selections will display in the fields next to the From and Thru buttons.

To select all names, click the All button.

3. At the Name Range dialog, click:

OK (ALT + O) to finalize code selections.

Cancel (ALT + C) to return to the report selection dialog without selecting.
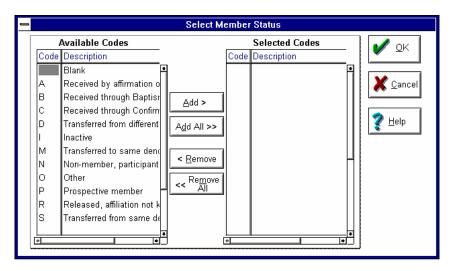
Member, Participation, and Group Selections

The selection buttons which display on the report selection dialog are different according to the report being run. Notice that the word 'All' or 'Some' displays on each button. 'All' will display if all are selected. 'Some' will display if only some of the selection codes are selected. To see the selected codes, click on the selection button and view the list.

1. At the report selection dialog, click on the selection button (Member Status, Participation Status, or Group.)

2. The selection code dialog will display.

SAMPLE Selection Code Listing - Select Member Status

3. The dialog will list the Member, Participation, or Group codes. Only people or batches associated with the selected codes will print on the report. Codes which have not been selected will display in bold under "Available Codes." Codes which have been selected will display in bold under "Selected Codes." Use the buttons located between the columns to add and remove the codes. See "Selection Dialog Box Command Buttons" on page 19 for instructions on using the add and remove buttons.

4. Click:

   OK (ALT + O) to finalize selections.

   Cancel (ALT + C) to return to the report selection dialog without saving the selections.
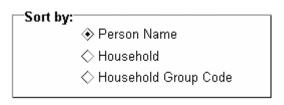
Include Persons to be Removed

☑ Include Persons to be Removed

The Include Persons to be Removed option is available on some reports. You may or may not wish to include on the report persons or households marked for removal. (This is applicable only if you are also using *CMS Membership for Windows*.)

◆ Click on the Include Persons to be Removed check box to include persons marked for removal on the report. A check mark will display. (To remove the check, click the check box again.)

Sort by Option

```
┌─Sort by:──────────────────────────┐
│        ◈ Person Name              │
│        ◇ Household                │
│        ◇ Household Group Code     │
└───────────────────────────────────┘
```

The 'Sort by' option buttons on the Attendance Pattern or Consecutive Absences report allow the report to be sorted by Person Name, Household or Household Group Code.

◆ Click on the sort option to make the selection. The selected option will display a black circle within the diamond. One and only one sort option can be selected.

Attendance Standard Report Samples

Sample Reports

The following report samples are in this chapter:

- Attendance Detail

- Attendance Pattern

- Consecutive Absences

- First Time Attendees

- Group Attendance Summary

- Group Checklist

- Group Directory

- Group List and Definition

- Group Meeting Dates

- Group Head Counts

- Periodic Attendance Summary

- Number of Times of Attendance

- Visitor Request Cards

- Tables

Attendance Detail Sample

For attendance dates from 2/1/95 thru 4/1/95

Date	Attendance	Date	Attendance	Date	Attendance	Date	Attendance
	Lopez, Martin		231 Fairmeadow Lane		Lakewood		MN 55678-5567 (612) 435-0987
2/ 5/95	Second Service Sunda	2/12/95	Absent	2/19/95	Second Service Sunda	2/26/95	First Service Sunday
3/ 5/95	Second Service Sunda	3/12/95	Second Service Sunda	3/19/95	Absent	3/26/95	Second Service Sunda

Number of times: Absent   **2**
            Present   **6**

Date	Attendance	Date	Attendance	Date	Attendance	Date	Attendance
	Sommers, Craig		2301 Greenbriar Dr.		Lakewood		MN 55678-5567 (612) 456-2333
2/ 5/95	First Service Sunday	2/12/95	Absent	2/19/95	Absent	2/26/95	Absent
3/ 5/95	First Service Sunday	3/12/95	First Service Sunday	3/19/95	First Service Sunday	3/26/95	Absent

Number of times: Absent   **4**
            Present   **4**

Date	Attendance	Date	Attendance	Date	Attendance	Date	Attendance
	Witcomb-Gardner, Terri	2001	Greenbriar Dr.		Lakewood		MN 55677-5567 (612) 435-5690
2/ 5/95	First Service Sunday	2/12/95	First Service Sunday	2/19/95	First Service Sunday	2/26/95	Second Service Sunda
3/ 5/95	First Service Sunday	3/12/95	First Service Sunday	3/19/95	Second Service Sunda	3/26/95	Absent

Number of times: Absent   **1**
            Present   **7**

Number of persons who have attendance in Worship Service   **30**

- Reports attendance detail for each person in the selected group(s).

- Prints date and attendance across, then down.

- Totals absence and presents for each person.

- Total of people who have attendance in the group.

Attendance Pattern Sample

Attendance Pattern

For dates of attendance from 1/1/95   thru 3/31/95   *+=Present, .=Absent, blank=no attendance entered*

Phone	Last Attend.	MS	Jan-- Feb- Mar-		Tot Pres.	Tot Abs.
Heller, John	3/26/95	C	. ++++ +. ++ ++++		11	2
Heller, Karen	3/26/95	B	. ++++ ++++ ++++		12	1
Kohler, Tom (612) 345-7809	3/26/95	C	+++++ ++++ . +++		12	1
Kohler, Amy (612) 345-7809	3/26/95	C	+++++ +. ++ . +++		11	2
Kohler, Tim (612) 345-7809	3/26/95	C	+++++ ++++ . +++		12	1
Lopez, Anthony (612) 435-0987	3/26/95	C	+. +++ ++++ ++++		12	1
Lopez, Bonnie (612) 435-0987	3/26/95	C	+. +++ ++++ ++++		12	1
Lopez, Kenneth (612) 435-0987	3/26/95	C	+. +++ ++++ ++. +		11	2
Lopez, Bryan (612) 435-0987	3/26/95	C	+. +++ ++++ ++++		12	1
Lopez, Jose (612) 435-0987	3/26/95	C	+. +++ +. ++ ++. +		10	3
Lopez, Maria (612) 435-0987	3/26/95	B	+. +++ ++++ ++++		12	1
Lopez, Martin (612) 435-0987	3/26/95	B	+. +++ +. ++ ++. +		10	3
Sommers, Craig (612) 456-2333	3/19/95	P	++.. + +... +++.		7	6

Number of persons selected for   Worship Service   31
Attendance Totals: Present: 339   Absent: 64

- Reports the attendance pattern for individuals.

- Prints the characters selected on the print preference box. See "Print Preferences or Print Additional Information" on page 115.

- Can print up to 1 year for a group.

11/15/95   **Consecutive Absences**   Page 3

For dates of attendance from 3/1/95 thru 3/30/95

	Phone/Member Status	Last Attend.	Tot Pres.	Tot Abs.
Lopez, Bonnie 231 Fairmeadow Lane Lakewood MN 55678-5567	(612) 435-0987 Member by Confirmation	March 26, 1995	12	1
Lopez, Kenneth 231 Fairmeadow Lane Lakewood MN 55678-5567	(612) 435-0987 Member by Confirmation	March 26, 1995	11	2
Lopez, Bryan 231 Fairmeadow Lane Lakewood MN 55678-5567	(612) 435-0987 Member by Confirmation	March 26, 1995	12	1
Lopez, Jose 231 Fairmeadow Lane Lakewood MN 55678-5567	(612) 435-0987 Member by Confirmation	March 26, 1995	10	3
Lopez, Maria 231 Fairmeadow Lane Lakewood MN 55678-5567	(612) 435-0987 Member by Baptism	March 26, 1995	12	1
Lopez, Martin 231 Fairmeadow Lane Lakewood MN 55678-5567	(612) 435-0987 Member by Baptism	March 26, 1995	10	3
Sommers, Craig 2301 Greenbriar Dr. Lakewood MN 55678-5567	(612) 456-2333 Prospect. - Ready to join	March 19, 1995	7	6

Number of persons selected for   *Worship Service*   **31**
Attendance Totals: *Present:*   **339**   *Absent:*   **64**

- Prints those individuals who have been absent the specified number of times in a row <u>backwards</u> from the "Thru" date.

11/15/95 **First Time Attendees** Page 1

First Time Attendees on 1/8/95

Worship Service	WOR Weekly	Phone/Member Status	Last Attend.	Tot Pres.	Tot Abs.
Dennison, Lisa 2340 Juniper Apt. 2013 Lakewood MN 55676-5567		(612) 623-5510 Member by Confirmation	March 26, 1995	11	2
Heller, John 4578 Raleigh Avenue Northtown MN 55367-5536		Member by Confirmation	March 26, 1995	12	1
Heller, John 4578 Raleigh Avenue Northtown MN 55367-5536		Member by Confirmation	March 26, 1995	11	2
Heller, Karen 4578 Raleigh Avenue Northtown MN 55367-5536		Member by Baptism	March 26, 1995	12	1
Heller, Kristin 4578 Raleigh Avenue Northtown MN 55367-5536		Member by Baptism	March 26, 1995	12	1
Heller, Mark 4578 Raleigh Avenue Northtown MN 55367-5536		Member by Confirmation	March 26, 1995	11	2
Heller, Sharon 4578 Raleigh Avenue Northtown MN 55367-5536		Member by Confirmation	March 26, 1995	12	1

Number of persons selected for   *Worship Service*   **7**
Attendance Totals: *Present:*   **81**   *Absent:*   **10**

- Prints individuals who attended the group(s) for the first time on the specified date.

11/15/95   **Attendance Summary**   Page 1

For attendance dates from 3/1/95 thru 3/30/95

Worship Service   WOR

Absent		14
	Total Absent	14
First Service Sunday Morning		45
Second Service Sunday Morning		65
	Total Present	110

- Provides a summary count of attendance for the selected group(s).

- Provides the total number absent and present.

11/15/95   **Attendance Checklist**   Page 1

Bible Study Group 1   BS1
    Jose Lopez   The Jose Lopez Residence   Monthly   7:30p

                                   Comments

Allen, Jerome   7540 Lakewood Ave. NE Apt. 302
   ☐ Absent   ☐ Present
Daniels, Paul   2052 Circle Drive
   ☐ Absent   ☐ Present
Heller, John   4578 Raleigh Avenue
   ☐ Absent   ☐ Present
                Number of persons listed: **3**

- Provides an attendance checklist that may be used by group leaders to record each person's attendance.

Group Directory Sample

Worship Service

Allen, Jerome
7540 Lakewood Ave. NE Apt. 302
Minneapolis   MN 55677-5567
    (612) 456-2378

Allen, Judy
7540 Lakewood Ave. NE Apt. 302
Minneapolis   MN 55677-5567
    (612) 456-2378

Allen, Julie
7540 Lakewood Ave. NE Apt. 302
Minneapolis   MN 55677-5567
    (612) 456-2378

Allen, Mike
7540 Lakewood Ave. NE Apt. 302
Minneapolis   MN 55677-5567
    (612) 456-2378

Brown, James
172 Windsor Drive
Lakewood   MN 55677-5567

Brown, Marge
172 Windsor Drive
Lakewood   MN 55677-5567

Brown, Tim
172 Windsor Drive
Lakewood   MN 55677-5567

Daniels, Paul
2052 Circle Drive
P.O. Box 5567
Lakewood   MN 55677-5567

Dennison, Laura
2340 Juniper Apt. 2013
Lakewood   MN 55676-5567
    (612) 623-5510

Dennison, Lisa
2340 Juniper Apt. 2013
Lakewood   MN 55676-5567
    (612) 623-5510

Dennison, Sharon
2340 Juniper Apt. 2013
Lakewood   MN 55676-5567
    (612) 623-5510

Gardner, Mark
2001 Greenbriar Dr.
Lakewood   MN 55677-5567
    (612) 435-5690

Heller, John
4578 Raleigh Avenue
Northtown   MN 55367-5536

Heller, John
4578 Raleigh Avenue
Northtown   MN 55367-5536

Heller, Karen
4578 Raleigh Avenue
Northtown   MN 55367-5536

Heller, Kristin
4578 Raleigh Avenue
Northtown   MN 55367-5536

Heller, Mark
4578 Raleigh Avenue
Northtown   MN 55367-5536

Heller, Sharon
4578 Raleigh Avenue
Northtown   MN 55367-5536

Holmes, Kathy
7540 Lakewood Ave. NE Apt. 302
Minneapolis   MN 55677-5567
    (612) 456-2378

Kohler, Amy
5433 Willow Drive
P.O. Box 5536
Northtown   MN 55367-5536
    (612) 345-7809

Kohler, Tim
5433 Willow Drive
P.O. Box 5536
Northtown   MN 55367-5536
    (612) 345-7809

Kohler, Tom
5433 Willow Drive
P.O. Box 5536
Northtown   MN 55367-5536
    (612) 345-7809

Lopez, Anthony
231 Fairmeadow Lane
Lakewood   MN 55678-5567
    (612) 435-0987

Lopez, Bonnie
231 Fairmeadow Lane
Lakewood   MN 55678-5567
    (612) 435-0987

Lopez, Bryan
231 Fairmeadow Lane
Lakewood   MN 55678-5567
    (612) 435-0987

Lopez, Jose
231 Fairmeadow Lane
Lakewood   MN 55678-5567
    (612) 435-0987

Lopez, Kenneth
231 Fairmeadow Lane
Lakewood   MN 55678-5567
    (612) 435-0987

11/15/95 · **Group List and Definitions** · Page 1

Bible Study Group 1   BS1   **Monthly**   7:30p
   The Jose Lopez Residence
   Jose Lopez

       Definitions:

Activity	ALL
Class	ALL
Define by List	THIS GROUP IS DEFINED BY A LIST OF PERSONS
Gender	ALL
Grade Level	ALL
Member Status	ALL
Participation Status	ALL
Record Status	Records marked to be removed ARE included
Sunday School	ALL

Worship Service   WOR   **Weekly**
   Sanctuary
   Pastor Engstrom

       Definitions:

Activity	ALL
Class	ALL
Gender	ALL
Grade Level	ALL
Member Status	[blank]
Member Status	A
Member Status	B
Member Status	C
Member Status	D
Member Status	F
Member Status	I
Member Status	N
Member Status	O
Member Status	P
Member Status	Q
Member Status	U
Member Status	V
Participation Status	ALL
Record Status	Records marked to be removed ARE included
Sunday School	ALL

- Prints each group's definition.

11/15/95   **Group Meeting Dates**   Page 4

Worship Service
   Sanctuary   Pastor Engstrom   Weekly

1/ 1/95
1/ 8/95
1/15/95
1/22/95
1/29/95
2/ 5/95
2/12/95
2/19/95
2/26/95
3/ 5/95
3/12/95
3/19/95

- Reports dates of entered attendance for the group.

Group Head Counts Sample

10/16/95   **Group Head Count**   Page 1

Worship Service   WOR

Sanctuary   Pastor Engstrom   Weekly

Date	1st	2nd	Wed	Total
1/ 1/95	8	15	10	33
1/ 8/95	14	15	18	47
1/15/95	20	14	9	43
1/22/95	19	13	13	45
1/29/95	15	17	11	43
2/ 5/95	14	20	10	44
2/12/95	15	17	9	41
2/19/95	13	14	13	40
2/26/95	14	17	12	43
3/ 5/95	14	16	10	40
3/12/95	13	25	7	45
3/19/95	16	13	12	41
3/26/95	12	20	11	43
Totals	**187**	**216**	**145**	**548**

- Reports head count information entered on the groups window.

- Column headings are defined by using the preference button on the groups window.

Periodic Attendance Summary Sample

Periodic Attendance Summary
Summarized by Attendance Status

For Worship Service group(s)
For attendance dates from 1/1/95 thru 3/26/95

Monthly

| | Absent | | Present | | |
	Absent	Total	1st Serv	2nd Serv	Total
1	30	30	64	61	125
2	20	20	39	64	103
3	14	14	45	64	109
Total	64	64	148	189	337

- Reports summarized detail of Absent and Present attendance.

- Separates and totals Absent attendance codes and Present codes.

- Selection is made for summary time frame: weekly, monthly, quarterly, or yearly.

- Monthly or quarterly selections will print the month or quarter numbers to correctly organize the report.

Number of Times of Attendance Sample

For dates of attendance from 3/1/95 thru 3/30/95
Persons who have attended from 1 thru 4 times

	Phone/Member Status	Last Attend.	Tot Pres.	Tot Abs.
Lopez, Bryan 231 Fairmeadow Lane Lakewood MN 55678-5567	(612) 435-0987 Member by Confirmation	March 26, 1995	12	1
Lopez, Jose 231 Fairmeadow Lane Lakewood MN 55678-5567	(612) 435-0987 Member by Confirmation	March 26, 1995	10	3
Lopez, Kenneth 231 Fairmeadow Lane Lakewood MN 55678-5567	(612) 435-0987 Member by Confirmation	March 26, 1995	11	2
Lopez, Maria 231 Fairmeadow Lane Lakewood MN 55678-5567	(612) 435-0987 Member by Baptism	March 26, 1995	12	1
Lopez, Martin 231 Fairmeadow Lane Lakewood MN 55678-5567	(612) 435-0987 Member by Baptism	March 26, 1995	10	3
Sommers, Craig 2301 Greenbriar Dr. Lakewood MN 55678-5567	(612) 456-2333 Prospect. - Ready to join	March 19, 1995	7	6
Witcomb-Gardner, Terri 2001 Greenbriar Dr. Lakewood MN 55677-5567	(612) 435-5690 Non-member, spouse or child of mem.	March 19, 1995	10	3

Number of persons selected for   *Worship Service*   **31**
Attendance Totals: *Present:*   **339**   *Absent:*   **64**

- Prints a list of people who have attended the specified range of times during the entered range of dates.

Visitor Request Cards Sample

Faith United Congregation
Welcome to our family! Please tell us who you are!

Date:_____

Name: _____

Address: _____

_____

City: _____ State:_____ Zip:_____

Phone: _____

❏ I am a visitor   ❏ Please call me

❏ Send Memb. Info

❏ Please visit me

- Prints a one-up card in a 3" x 5" format

- Intended for Avery 5388 Laser cards.

- May be copied to make 3 down cards.

11/15/95   **Attendance**   Page 1

Code	Status	Description
1st Serv	Present	First Service Sunday Morning
2nd Serv	Present	Second Service Sunday Morning
Absent	Absent	Absent
Present	Present	Present

10/16/9   **Membership Status**   Page   1

Status Description

Status	Description
	Blank
A	Affiliate or associate member
B	Member by Baptism
C	Member by Confirmation
D	Member, transferred fr another cong
F	Friends, pastors, others for labels
I	Member-Inactive. Does not part/cont
N	Non-member, spouse or child of mem.
O	Other
P	Prospect. - Ready to join
Q	Prospect. - Not ready to join
T	Transferred or moved
U	Unknown - Status being researched
V	Visitor or occasional contributor
W	Deceased
Z	Used for recording loose offering

11/15/95   **Participation Status**   Page   1

Status Description

Status	Description
	Blank
A	Active
C	Student away at school
H	Homebound
L	Living in an institution
M	Military
N	Non-Resident. Do not include in Dir
S	Associate member

<u>Code</u> <u>Description</u>
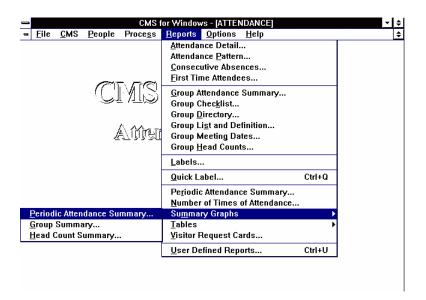
Code	Description
1	Mr. & Mrs.
2	Mr.
3	Mrs.
4	Dr. & Mrs.
5	Rev & Mrs.
6	Miss
7	Ms.
8	Mr. & Dr.
9	Dr.
10	Dr. & Dr.
11	Rev.

Summary Graphs

Summary Graphs Overview
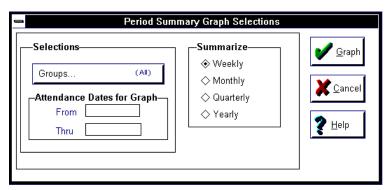
There are three Summary Graphs. They are the Periodic Attendance Summary, Group Summary, and Head Count Summary. The Group Summary Graph is displayed as a pie chart.

♦ Choose Summary Graphs from the Report menu. A cascading Graph menu will display the graph options.

Viewing the Periodic Attendance Summary Graph

1. Select Periodic Attendance Summary from the cascading menu. The Periodic Summary Graph Selections dialog will display.

2. The Groups selection button allows you to choose the attendance groups to be graphed. All groups is the default selection.

   Click the Groups selection button if you wish to generate a graph for specific groups. The Select Group Code dialog displays. Codes which have not been selected will display in bold under "Available Codes." Codes which have been selected will display in bold under "Selected Codes." Use the buttons located between the columns to add and remove the codes. See "Selection Dialog Box Command Buttons" on page 19 for instructions on using the add and remove buttons.

3. Enter the from and thru attendance dates for the graph.

4. Select an option button for the period you wish to summarize: Weekly, Monthly, Quarterly or Yearly.

NOTE: For best results select one group at a time and choose maximum date ranges: Weekly = 13 weeks, Monthly = 9 months, Quarterly = 4 quarters, or Yearly = 5 years.

---
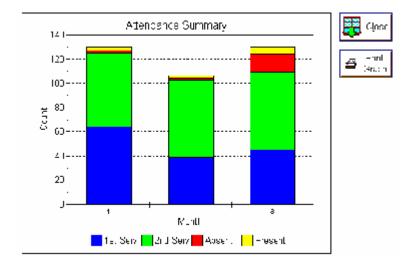
5.   Click:

Graph to display the graph.

<u>C</u>ancel (ALT + C) to close the dialog.

The Periodic Attendance Summary Graph

The Periodic Attendance Summary graph displays attendance counts by the selected period (i.e. weekly, monthly, quarterly or yearly). Each count is broken down by attendance code.

♦   From the Attendance Summary graph, click:

C<u>l</u>ose (ALT + L) to close the graph.
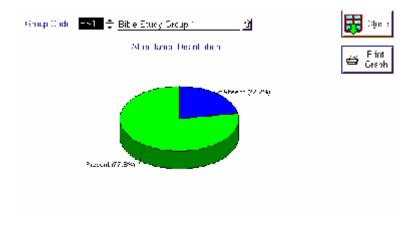
Print Graph to print the graph.

Viewing the Group Summary Graph

♦ Select Group Summary from the cascading menu. The Group Summary Graph displays.

The Group Summary Graph

The Group Summary graph displays a pie chart depicting attendance distribution by attendance code for the selected group.
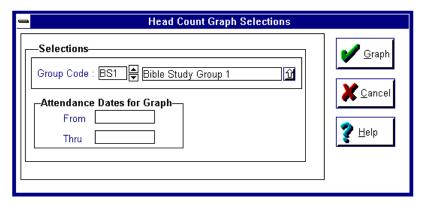
1. Select the group you wish to graph by clicking the up or down arrows in the group code box until the appropriate group is selected. Or, click the group code look-up button and select a group from the Groups dialog box.

2. From the Group Summary graph, click:

   Close (ALT + L) to close the graph.

   Print Graph to print the graph.

Viewing the Head Count Summary Graph

1. Select Head Count Summary from the cascading menu. The Head Count Graph Selections dialog will display
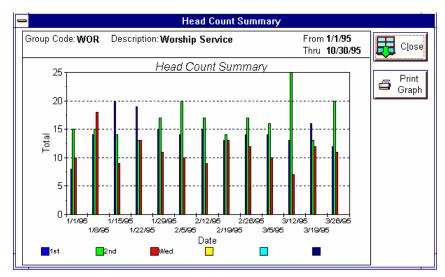
2. Select the group you wish to graph by clicking the up or down arrows in the group code box until the appropriate group is selected. Or, click the group code look-up button and select a group from the Groups dialog box.

3. Enter the from and thru attendance dates for the graph.

4. Click:

   Graph to display the graph.

   Cancel (ALT + C) to close the dialog.

The Head Count Summary Graph

The Head Count Summary Graph displays a bar graph showing head counts by Attendance Code for the dates selected.

♦   From the Head Count Summary graph, click:

   Close (ALT + L) to close the graph.

   Print Graph to print the graph.

User Defined Reports

The powerful *Crystal Report*s report generator is an optional feature of *CMS for Windows™* and is purchased separately. With *Crystal Reports* you can develop specific reports from the large base of information stored within *CMS Attendance*. From simple modifications to existing reports, to creating entirely new reports, you'll find *Crystal Reports* powerful and easy-to-use.

For more information, contact Church Management Solutions.
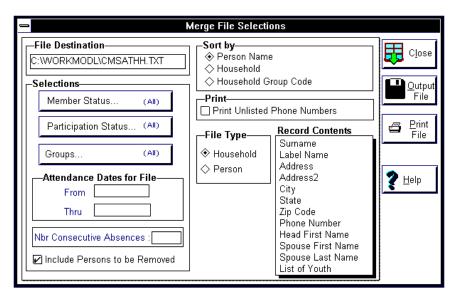
Merge File

Merge File Overview

The Merge File process outputs an ASCII comma delimited (comma separated) data file with pre-determined data fields. This data file may be output to a computer's hard disk or a diskette. Most Word Processing, Spreadsheet, and Database software can make use of data in this format for merging into form letters or other processing.

Creating a Merge File

1. From the Process Menu, choose Merge File. The Merge File Selections dialog will display

2. Type in a complete path name of where you would like the system to generate the data file. To specify a directory that has not been created, use File Manager or DOS to create the directory first. The file must be

a valid DOS filename, the three letter extension is optional. You may specify a diskette drive letter for the file such as **B:CMSHH.TXT** or **A:TEST**. The system will output the file to the indicated drive.

3   Click:

O̲utput File (ALT + O) to start the process to output the ASCII data file to the destination.

P̲rint File (ALT + P) to print a report of the data that will be in the data file. Please note the format of the report does not correspond to the format of the data file. The report has reformatted for printing in a readable format.

C̲lose (ALT + L) to abort the process and return to the main menu.

Example of Records in Merge File

```
"Allen","Jerome and Judy Allen","7540 Lakewood Ave. NE
Apt. 302","","Minneapolis","MN","55677-5567","(612)
456-2378","Jerome","Judy","Allen",""

"Brown","Dr. & Mrs. James Brown","172 Windsor
Drive","","Lakewood","MN","55677-5567","(612) 567-
3109","James","Marge","Brown",""

"Daniels","Paul Daniels","2052 Circle Drive","P.O. Box
5567","Lakewood","MN","55677-5567","(612) 567-
0923","Paul","","",""
```

Password Maintenance

Password Maintenance Overview
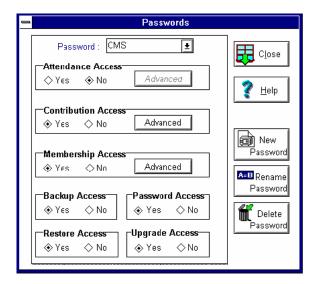
You can define passwords that allow access to your CMS system. Passwords can be defined to allow separate access to the *Membership*, *Contribution* and/or *Attendance* modules of CMS. In addition, a password can be defined to allow or deny access to different functions within each module. You can define as many passwords as you need.

In this chapter, we will cover:
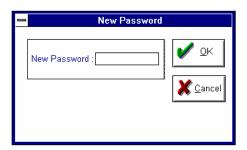
- Defining a New Password

- Assigning Password Access

- Renaming a Password

- Deleting a Password

Defining a New Password

1. Choose Passwords from the File Menu. The Passwords dialog displays.

2. Click the New Password button. The New Password dialog will display.

3. Type the new password in the New Password field. The password can be up to 10 characters in length. CMS will assume all capital letters for the password, regardless of how the password is entered.

4. Click OK. A dialog will ask if the password is correct.

5. Click 'Yes'. The new password is now entered into CMS. The default status of the new password allows access to all modules and all functions.

Assigning Password Access

1. Click the arrow in the Password drop-down list button to display the current list of passwords. (If the list is longer than the size of the box, scroll bars are provided for you to view the complete list.) Select the password to update. The password will display in the Password box.

2. Select the access status by clicking yes or no for each of the following:

Attendance Access	You can allow or deny access to the Attendance module.
Contribution Access	You can allow or deny access to the Contribution module.
Membership Access	You can allow or deny access to the Membership module.
Backup Access	You can allow or deny access to the Backup data command.
Restore Access	You can allow or deny access to the Restore data command.
Password Access	You can allow or deny access to Password Maintenance. You must allow at least one password to have access to Password Maintenance. (CMS will not allow you to change or delete the only password with Password Maintenance access.)
Upgrade Access	You can allow or deny access to the upgrade menu selection. The upgrade selection is used to install system upgrades to your *CMS for Windows^{TM}* system.
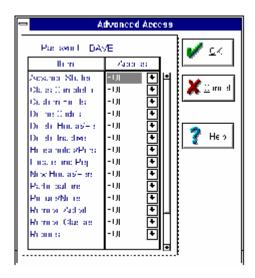
3. You can use the Advanced buttons to select which functions can be accessed within each module. The appropriate Advanced button is activated when *yes* is selected for access to Attendance, Contribution or Membership. Click the 'Yes' option button under Membership Access, then click the adjacent Advanced button to view the Advance Access dialog.

4. The Advance Access dialog lists each item you can define access to and the access status for each item. Use the scroll bars provided to view the entire list. Click the drop-down list button next to an item to view your choices. Select FULL (full access), READ (read only access) or NONE (no access).
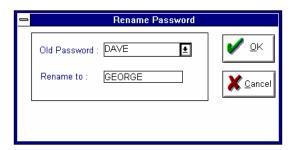
5. After completing the necessary changes, click OK to return to the Passwords dialog.

Renaming a Password

You can rename a password. The renamed password will assume the same access conditions that were previously defined for the old password.

1. From the Passwords dialog, click the Rename Password button to display the Rename Password dialog.
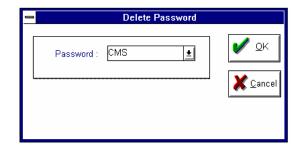
2. Click the arrow on the Old Password drop-down list button. Select the password to change.

3. Type the new password in the *Rename to* field.

4. Click the OK button. A dialog will ask if the new password is correct. Click 'Yes' or No.

Deleting a Password

CMS will not allow you to delete the only password in CMS. You must have at least one password in CMS and at least one password with access to Password Maintenance.

1. From the Passwords dialog, click the Delete Password button to display the Rename Password dialog.

2. Click the arrow on the Password drop-down list button. Select the password to delete.

3. Click the OK button. At the confirm dialog, click 'Yes' to delete the password or 'No' to cancel.

Backup and Restore

Backup and Restore Overview

The Backup function saves to disk all user information and all reports, including user defined reports. We encourage you to backup periodically to insure information security. You will also be prompted to backup prior to certain processes.

The restore process will restore previously backed up information including all user information data and all reports, including user defined reports. You can use the restore process to recover information if files have been corrupted or inadvertently changed.
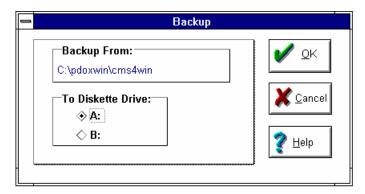
Note: As a precautionary measure, the restore function will create a copy of current data in a "zipped" file. It will be named B4RESTORE.ZIP and will be saved to the Paradox Runtime directory.

In this chapter, we will cover:
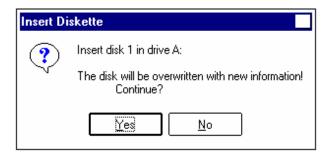
- Backup

- Restore

Backup

1. Choose Backup (CTRL + B) from the File menu. A dialog will advise you that you will exit CMS prior to backup. Click 'Yes' to exit. The Backup dialog will display.

2. Click the appropriate option button to backup to the A or B drive.

3. Click OK. The Insert Diskette Dialog displays.
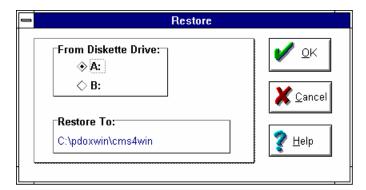
4. Insert a diskette into the appropriate disk drive. Click 'Yes' to begin the backup process. Any files on the disk will be overwritten with new information. If the backup files are too large to fit on a single diskette, you will be prompted to insert additional diskettes until the backup process is complete.

Restore
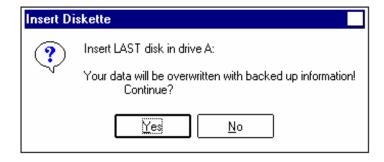
1. Choose Restore from the File menu. A dialog will advise you that you will exit CMS in order to restore. Click 'Yes' to exit CMS. The Restore Process dialog will display.

2. A Restore Process warning states that the restore process will overwrite existing data on your computer. Click 'Yes' to proceed. The Restore dialog will display.

3. Click the appropriate option button to backup to the A or B drive.

4. Click OK. The Insert Diskette Dialog displays.

5. Insert a diskette into the appropriate disk drive. If the backup files were written on more that one diskette, insert the **LAST DISK FIRST**. Click 'Yes' to begin the restore process. You will be prompted to insert additional diskettes in reverse order until the backup process is complete.

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